

# THE WEALTH FORUM

Thursday 31 October – Friday 1 November 2024  
at The Grove Hotel, Hertfordshire, WD3 4TG

## SPONSORS



## Participant List

- **Alder Investment Management**, *Chief Investment Officer*
- **Ascencia Investment Management**, *Chief Investment Officer*
- **Atomos**, *Head of High Net Worth*
- **Bennett Wealth Planning**, *Chartered Wealth Manager*
- **Brighton Capital Management**, *Private Wealth Manager*
- **Brooks Macdonald Group**, *Investment Director*
- **Casterbridge Wealth**, *Senior Investment Analyst*
- **Charles Stanley**, *Head of Asset Management*
- **Copia Capital Management**, *Senior portfolio manager*
- **Dragon Investment Managers**, *Investment Director*
- **Evelyn Partners**, *Associate Investment Partner*
- **Fidelius**, *Investment Analyst*
- **Hay Hill Wealth Management**, *Chief Investment Officer*
- **IBOSS Asset Management**, *Chief investment officer*
- **IPS Capital**, *Investment Analyst*
- **Independent Wealth Planners (IWP UK)**, *Chief Investment Officer*
- **Investec Wealth & Investment (UK)**, *Senior Investment Director*
- **J. Stern & Co**, *Investment Specialist and Client Director*
- **Kingswood**, *Investment Manager - Vice President*

- **LeifBridge Investment Services**, Investment Manager
- **Lyndhurst Financial Management**, Investment Analyst
- **Lyndhurst Financial Management**, *Senior Consultant and Head of Investment Committee and Fund Selection*
- **Norman K**, *Wealth Advisor*
- **PK Group London**, *Senior Investment Manager*
- **RSMR**, *Director*
- **Raymond James Investment Services**, *Wealth Manager*
- **Rivers Capital Management**, *Portfolio Manager*
- **Saltus Partners**, *Investment Manager*
- **Saltus Partners**, *Partner*
- **Skerritts Wealth Management**, *Trainee Investment Manager*
- **Smith & Pinching Financial Services**, *Executive Director*
- **Tatton Investment Management**, *Investment Manager*
- **The Private Investment Office**, *Co-Founder & Joint Managing Director*
- **The Private Office**, *Head of Investments*
- **Tribe Impact Capital**, *Chief Investment Officer*
- **Verso Wealth Management**, *Collective Portfolio Service Manager*
- **Vintage Asset Management**, *Managing Director*
- **Waverton Investment Management**, *Chief Executive Officer*

## **FACILITATORS & SPEAKERS**

- **WealthWise - Part of Fintel**, *Head of Media and Content*

## **INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS**

- **Defaqto**, *Insight Manager (Funds and DFM)*
- **Fintel**, *Head of Investment Management Compliance Fintel; Head of Signature*