

WEALTHTECH MATTERS

WealthTech Matters - Spring 2025

Thursday 13 March 2025, SEI Investments, 14-18 Finsbury Square, London EC2A 1BR

Sponsor



Participant List

- **2 Plan Wealth Management**, *Head of Technology*
- **ARRT Integration**, *Integration Director*
- **Artorius Wealth**, *Applications and Systems Manager*
- **BBVA Mexico**, *Investment Counselor*
- **Brooks Macdonald Asset Management**, *Chief Technology Officer*
- **Burlington Associates**, *Managing Director*
- **Cadro**, *Head of Operations*
- **Charles Stanley**, *Product Manager*
- **Close Brothers Asset Management**, *Chief Digital Officer*
- **Fidelius**, *Chief Executive Officer*
- **Finli Group**, *Chief Operating Officer*
- **Fintel**, *Head of Investment Management Compliance SimplyBiz DFM*
- **Goalkeep**, *Managing Director*
- **Hurst Point Group**, *Chief Technology & Transformation Officer*
- **Independent**, *Strategy Execution Director*
- **Irwin Mitchell**, *Chief Operating Officer*
- **James Hambro & Partners**, *Chief Operating Officer*
- **James Hambro & Partners**, *Partner*
- **Loyal North**, *Acquisitions Director*
- **MKC Wealth**, *Chief Technology Officer*
- **Mazars Financial Planning**, *Partner*
- **Openwork**, *Chief Technology Officer*
- **Openwork**, *Commercial Director*
- **Parmenion Capital Partners**, *Chief Commercial Officer*

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- **Parmenion Capital Partners**, *Head of Product (Data and Services)*
- **Rothschild & Co**, *Head of Investment Solutions and Client Support*
- **Sesame Bankhall Group**, *Chief Operating Officer*
- **Sesame Bankhall Group**, *Distribution Director*
- **Wealth Wizards**, *Chief Strategy Officer*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Woven Advice**, *Co-Founder*