

WEALTHTECH MATTERS

WealthTech Matters The Adviser 2024
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Participant List

- **2 Plan Wealth Management Limited**, *Head of Operations and IT*
- **ARRT Integration**, *Integration Director*
- **AXSA Wealth Management**, *Wealth Management Analyst*
- **Abrdn**, *Chief Operating Officer, Adviser*
- **Alpha FMC**, *Executive Director - Head of UK Wealth Management & Private Banking*
- **Alternative Business Funding**, *CEO/COO*
- **Artorius Wealth**, *Applications and Systems Manager*
- **Artorius Wealth**, *IT Manager*
- **BBVA Mexico**, *Investment Counselor*
- **Beaufort Financial Reading**, *Consultant*
- **Beckett Investment Management**, *Operations Director*
- **Brooks Macdonald Asset Management Limited**, *Chief Technology Officer*
- **Charles Stanley**, *Head of Digital*
- **Charles Stanley**, *Product Manager*
- **Close Brothers Asset Management**, *Chief Digital Officer*
- **Connor Broadley**, *Managing Director*
- **Crowe Financial Planning UK Limited**, *Operations Director*
- **Emery Little Wealth Management Limited**, *Head of Operations*
- **Fairstone Financial Management**, *Chief Technology Officer*
- **Finli Group**, *Chief Operating Officer*
- **Finovation Consulting**, *Director*

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- **HFMC Wealth Management**, *Chief Operating Officer*
- **Hargreaves Lansdown Asset Management Limited**, *Head of Advisory Product*
- **Holden & Partners** *Paraplanning Director*
- **J. Stern & Co**, *Client Director*
- **James Hambro & Partners**, *Chief Operating Officer*
- **James Hambro & Partners**, *Partner*
- **Julius Baer International**, *Head of Product Management*
- **Killik & Co**, *Partner - Head of Digital Delivery*
- **Kingswood**, *Project Analyst*
- **MKC Wealth**, *Chief Technology Officer*
- **Mazars Financial Planning Limited**, *Partner*
- **P1 Investment Management**, *Head of Business Development*
- **Parmenion Capital Partners**, *Chief Commercial Officer*
- **Progeny Wealth Limited**, *Chief Technology Officer*
- **RBS**, *Managing Director, Investing Journeys, Customer & Growth – Asset Management*
- **Rathbones Group**, *Director, Client Strategy & Insight*
- **Rothschild & Co**, *Head of Investment Solutions and Client Support*
- **Ruffer**, *Chief Technology Officer*
- **SG Kleinwort Hambros Bank Limited**, *Group Chief Operating Officer*
- **Saranac Partners Limited**, *Head of Technology*
- **Sarasin & Partners**, *Client Affairs Business Manager, Associate Partner*
- **Saunderson House Limited**, *Head of Information Technology*
- **Tavistock Investments**, *Corporate Development Director*
- **Threesixty services**, *Chief Executive Officer*
- **VouchedFor**, *Chief Operating Officer*
- **Waverton Investment Management Limited**, *Chief Operating Officer*
- **Wealth Wizards**, *Chief Strategy Officer*
- **Westpac Banking Corporation**, *Senior Manager, Risk & Compliance*
- **Whitman Asset Management**, *Operations Lead, Finance & Business Development*

SPONSORS & EXPERTS

- **Additiv**, *Head of Strategy and Marketing*
- **Collidr**, *Sales Director*
- **Collidr**, *Sales Director*
- **InvestCloud Inc**, *Head of Strategy, InvestCloud Europe and Asia*

- **InvestCloud Inc**, *Sales Director, UK & Europe*
- **Redmill Advance**, *Commercial Director*
- **Redmill Advance**, *Managing Director*
- **Vanguard**, *Head of Offer Development, Europe*

FACILITATORS & SPEAKERS

- **Alpha FMC**, *Partner*
- **GDR Creative Intelligence**, *CEO*
- **JoyndUp**, *Director*
- **Melo**, *Chief Innovation Officer & Director of Progress*
- **Opus Una**, *Managing Director*
- **Silverback Consultancy**, *Founder & Director*
- **Solve**, *Director*
- **The lang cat**, *Managing Director consulting & insight*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Financial Software**, *Sales Manager*
- **Pavilion Recruitment Solutions**, *Recruitment Consultant*
- **Simplybiz Support**, *Sales Consultant*
- **The Flower Group**, *Chief Executive Officer*
- **Tillon Group**, *Director*
- **Tillon Group**, *Founder & Managing Director*
- **Time to Give Network**, *Chief Executive Officer*