

Sponsors



Participant List

BUSINESS STRATEGY

- **1825**, *Business Development Director*
- **2plan Wealth Management**, *CEO*
- **Attivo Group**, *Financial Planning Director & Chartered Financial Planner*
- **Aviva**, *Head of Advice*
- **Beaufort Group**, *CEO*
- **Beaufort Group**, *Chief Operating Officer*
- **Charles Stanley Plc**, *Group Head of Distribution*
- **Defaqto Ltd.**, *Head of Insight and Consulting-Wealth and Protection*
- **Discover Financial Group**, *Director*
- **EQ Investors**, *Executive Director*
- **EQ Investors**, *Executive Director*
- **Foster Denovo**, *CEO*
- **HFMC Wealth Group**, *Chief Operating Officer*
- **Hargreaves Lansdown Group**, *Head of Advisory Services*
- **Hargreaves Lansdown Group**, *Head of Workplace Retirement*
- **Helm Godfrey Partners Ltd**, *Chairman of the Board*
- **LEBC Group**, *Group Development Director*

- **LEBC Group**, *Public Affairs & Communications Adviser*
- **Mattioli Woods Plc**, *Business Development Director*
- **New Leaf Distribution**, *Chief Executive Officer*
- **New Leaf Distribution**, *Managing Director*
- **Paradigm Norton**, *COO*
- **Parkgate Financial Solutions**, *Managing Partner*
- **Personal Touch Financial Services**, *Head of Wealth Management*
- **Pi Financial Ltd**, *Business and Development Director*
- **Pi Financial Ltd**, *CEO*
- **Punter Southall Financial Management Ltd**, *Chief Executive Officer*
- **Quilter**, *Group Managing Director*
- **RSMR**, *Managing Director*
- **Sandringham Financial Partners**, *Director of Recruitment*
- **Sesame Bankhall Group**, *Executive Chairman*
- **Sesame Bankhall Group**, *Group Managing Director*
- **Sesame Bankhall Group**, *Managing Director*
- **SimplyBiz Plc**, *Managing Director*
- **St. James's Place Wealth Management Group**, *Head of Establishment, Regulatory*
- **Tavistock Investments Plc**, *Group Business Development Director*
- **Tenet Group**, *Chief Executive*
- **Tenet Group**, *Group Operations Director*
- **The Fry Group**, *CEO*
- **The Private Office**, *CEO*
- **Threesixty services LLP**, *Compliance Director*
- **Tilney Group**, *Technical Specialist*
- **Validpath Ltd**, *Managing Director*
- **Willis Owen**, *Managing Director*

INVESTMENT

- **AFH Wealth Management**, *Group Head of Investment Research*
- **Barclays Wealth & Investment Management UK**, *Head of International Investment Distribution*
- **Barclays Wealth & Investment Management UK**, *MD Global Distribution Barclays Private Bank*
- **Helm Godfrey Partners Ltd**, *Director and Wealth Management Adviser*
- **Killik & Co**, *Head of Wealth Planning*
- **Mazars LLP**, *Chief Investment Officer*
- **Origen Financial Services**, *Head of Proposition & Technical*

- **Sanlam UK**, *Head of Proposition Delivery*
- **The Private Office**, *Senior Partner/Chair of Investment Committee*

SPONSORS & EXPERTS

- **AKG Financial Analytics Ltd**, *Communications Director*
- **Aviva Investors**, *Head of Third Party Sales*
- **Aviva Investors**, *Investment Specialist, Multi-assets*
- **Carmignac Gestion**, *Business Development Director*
- **Carmignac Gestion**, *Head of UK Distribution*
- **Currencies Direct**, *Head of Partnerships, UK*
- **Currencies Direct**, *Strategic Partnerships Manager*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Dimensional Fund Advisors Ltd**, *Vice President*
- **FundsNetwork**, *Associate Director, FundsNetwork Strategic Accounts*
- **FundsNetwork**, *Senior Sales Manager, FundsNetwork Strategic Accounts*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Goldman Sachs Asset Management International**, *Managing Director, Business Strategy, Strategic Advisory Solutions*
- **Janus Henderson Investors**, *Head of UK Advisory Sales*
- **Janus Henderson Investors**, *Senior Product Specialist*
- **NS&I**, *Head of Intermediary Relationships*
- **NS&I**, *Senior Intermediary Marketing Manager*
- **T Rowe Price**, *Head of UK Adviser, Platforms and Strategic Partners*
- **T Rowe Price**, *Solutions Strategist in the Multi-Asset division*
- **Vanguard**, *Investment Analyst*
- **Vanguard**, *Strategic Account Manager*
- **Vanguard**, *Strategic Account Manager*

FACILITATORS & SPEAKERS

- **Alchemy Worldwide**, *Executive Partner*
- **Independent Consultant**, *Director*
- **Independent Consultant**, *Founder*
- **Independent**, *Sleep Evangelist & NHS Innovation Accelerator Fellow*
- **JCURV**, *Managing Director*
- **JoyndUp Ltd**, *Director*

- **Milliman UK**, *Head of Strategy*
- **Orion Consultancy Limited**, *Consultant*
- **Rennison Consulting Ltd**, *Director*
- **Soprano Consulting**, *Managing Director*
- **Sticky Marketing Club Ltd**, *CEO*
- **Wild Ochre Consulting**, *Founder*