



Vouchedfor and Owen James Events Adviser Awards 2025

Thursday 8 May 2025, The Biltmore, 44 Grosvenor Square, London W1K 2HP

## Sponsors:

**BlackRock**



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## Participant List:

- **2 Plan Wealth Management Limited**, *Managing Director*
- **Allisons financial planning Ltd**, *CEO*
- **Argentis Financial Planning Ltd**, *Head of Mergers & Acquisitions*
- **Argentis**, *Director*
- **Argentis**, *Head of M&A*
- **Ascot Lloyd**, *Head of Commercial Strategy*
- **Asquith Financial Services**, *Director*
- **Balance:Wealth Planning**, *CEO*
- **Barwells Independent Financial Management**, *Chief Executive Officer*
- **Barwells Wealth**, *Chief Executive Officer*
- **Better World Financial Planning Limited**, *Director*
- **Brierie Financial Planning**, *Director*
- **Britannic Place Financial Management Limited**, *Director*
- **Colmore Partners**, *CEO*
- **Colmore Partners**, *Director*
- **Colmore Partners**, *Financial Planning Director*
- **Colmore Partners**, *Managing Director*
- **Connect**, *CEO*
- **Dave Southby Financial Planning**, *Director*
- **David James Wealth**, *CEO*

- **David James Wealth**, *Managing Director*
- **Druthers Financial Planning**, *Founder*
- **Druthers Financial Planning**, *Founder and Financial Planner*
- **EBCam Limited**, *CEO*
- **EBCam Limited**, *Managing Director*
- **EBCam Limited**, *Managing Director*
- **EightWealth**, *Founder and CEO*
- **Fidelius**, *Commercial Director*
- **Fidelius**, *Director*
- **Fidelius**, *Head of Commercial*
- **Finli (FLP) Ltd**, *Director*
- **Finli (FLP) Ltd**, *Director*
- **Finli (FLP) Ltd**, *Director & Independent Financial Planner*
- **Global Advice Group Ltd**, *Director*
- **Great British Finance Limited**, *Director / Owner*
- **Great British Finance Limited**, *Managing Director*
- **Handelsbanken plc**, *CEO*
- **Handelsbanken plc**, *Director/Owner*
- **Handelsbanken Wealth and Asset Management Ltd**, *CEO*
- **Hunter wealth management**, *Director*
- **KBA FS Ltd**, *Chief Executive Officer*
- **KBA**, *CEO*
- **LifeSearch**, *COO*
- **M&G Wealth**, *CEO - Advice*
- **M&G Wealth**, *CEO – Advice*
- **Margetts Wealth Management Ltd**, *CEO*
- **Mindful Financial Planning**, *Director*
- **Mindful Financial Planning**, *Director*
- **MKC Wealth Ltd**, *Compliance Director*
- **MKC Wealth**, *CEO*
- **New Leaf Distribution Ltd**, *CEO*
- **Newcastle Financial Advisers**, *Managing Director*
- **One Financial Solutions**, *Managing Director*
- **Openwork Limited**, *Proposition Director*
- **Perspective Financial Group Limited**, *Chief Operating Officer*

- **Perspective Financial Group**, *Chief Operating Officer*
- **Positive Wealth Creation Ltd**, *Director*
- **Sandringham/M&G**, *Managing Director*
- **Strategic Solutions Financial Services**, *Partner*
- **Strategic Solutions Financial Services**, *Partner & Chartered Financial Planner*
- **The Openwork Partnership**, *Managing Director*
- **The Private Office (TPO)** , *CEO*
- **The Private Office**, *Partner*
- **Validpath Ltd**, *Succession Director*
- **ValidPath**, *Director*
- **Walden Capital**, *Director*
- **Walden Capital**, *Director*