



GUEST LIST

Breakfast Panel **Entrepreneurs and Exit Planning**

Trowers and Hamlins
3 Bunhill Row, London

[VIEW MAP](#)

Thursday, 6 February 2020

Name	Position	Company	Country
Host:			
David Bell	Founder	PCD Club	United Kingdom
Chairperson:			
Ken Chapman	Head of Wealth Planning	EFG Private Bank Limited	United Kingdom
Panel Speakers:			
Adrian Jones	Partner	Trowers & Hamblins	United Kingdom
Derek Zissman	Co-Founder	Crossroads Partners	United Kingdom
Hannah Wailoo	Partner	Trowers & Hamblins	United Kingdom
Guest List:			
Aaron Stead	Manager, Private Client Tax	RSM UK	United Kingdom
Alan Ross	Senior Vice President	Maples Group	United Kingdom
Alastair Hazell	Banking Director	Hampden & Co	United Kingdom
Alex Balfour	Associate Director	Smith & Williamson LLP	United Kingdom
Alexander Dean	Director	EFG Private Bank Limited	United Kingdom
Alexander Robertson	Mortgage Broker	Enness Global Mortgages	United Kingdom
Alexandra Kenna	Citizenship and Residency Advisor	C. Savva & Associates	United Kingdom
Andrew Sorrell	Senior Paralegal	Trowers & Hamblins	United Kingdom
Andrew Tingley	Partner and Head of Immigration	Womble Bond Dickinson (UK) LLP	United Kingdom
Angus Dixon	Property Consultant	INHOUS Ltd	United Kingdom
Atul Bansal	Chief Executive Officer	Carlton Square Capital	United Kingdom
Ben Gilbert	Associate Partner	Sarasin & Partners LLP	United Kingdom
Caroline Jehan	Private Banker	Bank Lombard Odier & Cie Ltd	Switzerland
Catherine Whyte	Senior Manager	EFG Private Bank Limited	United Kingdom
Charles Hamilton Stubber	Senior Vice President	Lockton Companies LLP	United Kingdom
Charlotte Eva	Senior Manager	Dixon Wilson	United Kingdom
Charlotte Senior	Director	Grant Thornton UK LLP	United Kingdom
Chris Lloyd	Associate director	Enness Global Mortgages	United Kingdom
Connor Iontton	Solicitor	Thomson Snell & Passmore LLP	United Kingdom
Daniel Ryan	Private Banker	Arbuthnot Latham	United Kingdom
Daniel Sawyerr	Director	London and Capital	United Kingdom
Darren Lees	Financial Planner	Carbon Financial Partners Limited	United Kingdom
David Johnson	Assistant Director	EFG Private Bank Limited	United Kingdom
David Johnson	Managing Director	INHOUS Ltd	United Kingdom
David Treitel	Managing Director	American Tax Returns Ltd	United Kingdom
Dominic Lacey	Director, Financial Planning	Tilney	United Kingdom
Edward Finney	Business Development Manager	Octopus Investments	United Kingdom
Emily Walton	Senior Tax Manager	Frank Hirth	United Kingdom
Farzin Yazdi	Head of Investor Visa	Shard Capital Partners LLP	United Kingdom
George Apperly	Assistant Vice President	Lockton Companies LLP	United Kingdom
George Campanellas	CEO	Invest Cyprus	Cyprus
Gillian Wilson	Marketing & Communications Director	Strabens Hall Limited	United Kingdom
Helen Relf	Partner	RSM UK	United Kingdom
Hemant Nagpal	Tax Senior Manager	Grant Thornton UK LLP	United Kingdom
Henry Freeman	Executive Director	Liberum Wealth Limited	Guernsey
Howard Ledingham	Tax Consultant	Buzzacott	United Kingdom
Irina Phillips	Director	BOS Wealth Management Europe	United Kingdom
James Broderick	Director of Business Development	MHA MacIntyre Hudson	United Kingdom
James Kelway-Bamber	Investment Manager	Sarasin & Partners LLP	United Kingdom
James Kipping	Tax Partner and Head of Private Client	MHA MacIntyre Hudson	United Kingdom
James Leavey	Senior Manager	Apex Trustees	United Kingdom
James Rayner	Partner	Carrig Partners Ltd.	United Kingdom
Jaspal Pachu	Partner	Freeths LLP	United Kingdom
Jay Moghal	Partner	Lexus Law	United Kingdom
Jay Soneji	Partner and Head of Real Estate	Sheridans	United Kingdom
Jay Thurston	Senior Manager (Trusts)	Buzzacott	United Kingdom
Jean Marc Schaeffer	Head of External Asset Managers Europe	BOS Wealth Management Europe	Luxembourg

Name	Position	Company	Country
Jerry Giles	Associate Director	ETC Tax	United Kingdom
Jonathan Gain	CEO	Stellar Asset Management	United Kingdom
Julian Wheeler	Partner	Shard Capital Partners LLP	United Kingdom
Julie Jaggin	Senior Associate, Private Client	Kingsley Napley LLP	United Kingdom
Justin Mason	Director	Justin Mason Valuation	United Kingdom
Katie Nicholson	President	Locate Isle of Man	Isle of Man
Kezia Daley	Senior Associate	Winckworth Sherwood LLP	United Kingdom
Kitty Harris	Relationship Development Manager	Prism the Gift Fund	United Kingdom
Leon Batchelor	Partner	Carrig Partners Ltd.	United Kingdom
Ling Ye	Manager – Entrepreneurial Private Client Tax	Grant Thornton UK LLP	United Kingdom
Marie McCallum	Solicitor	Trowers & Hamblins	United Kingdom
Matthew Steiner	Business Development Director	Stellar Asset Management	United Kingdom
Mayur Lakhani	Executive Director	London and Capital	United Kingdom
Melanie Chan	Manager	Smith & Williamson LLP	United Kingdom
Michael Lewis	Director	Frank Hirth	United Kingdom
Michael Sharp	Chartered Financial Planner	Sharp Wealth Management	United Kingdom
Mitch Young	Co-Founder	Fusion Consulting Ltd	United Kingdom
Nathan Williams	Partner	Trowers & Hamblins	United Kingdom
Nicholas Palmer	Investment Director	Peregrine & Black	United Kingdom
Nicholas Toubkin	Senior Client Adviser	Strabens Hall Limited	United Kingdom
Nicholas Woolf	Partner	Woolf & Co	United Kingdom
Nicola Saccardo	Partner	Maisto e Associati	United Kingdom
Nicola Solomou	Solicitor	Trowers & Hamblins	United Kingdom
Nigel Holley	Partner	Soteria Private	United Kingdom
Nigel Rosner	Investment Director	Peregrine & Black	United Kingdom
Ogonna Agwa	Assistant Manager (Personal Tax)	Buzzacott	United Kingdom
Oliver Brind	Head of Business Development	Aperio Intelligence Limited	United Kingdom
Oliver Rowland	Tax Manager	Smith & Williamson LLP	United Kingdom
Paul Jebely	Managing Partner, Co-Chair of Private Wealth	Pillsbury Winthrop Shaw Pittman (HK) LLP	Hong Kong
Paul Schreiber	Managing Director	Oak Group	Guernsey
Paul Sumsion	Private Banker	Arbuthnot Latham	United Kingdom
Peter Arkell	Director	EFG Private Bank Limited	United Kingdom
Peter Sayers	Head of International Business Development	Strabens Hall Limited	United Kingdom
Philippe Kerkhoven	CEO	Pangaea Wealth	Singapore
Qiaojia Li	CEO	Rosecut Technologies	United Kingdom
Richard Pott	Senior Manager	Buzzacott	United Kingdom
Richard Stanwell	Director	EFG Private Bank Limited	United Kingdom
Robert Drysdale	Associate	Rooks Rider Solicitors LLP	United Kingdom
Robert Moore	Director, UK	Jersey Finance	United Kingdom
Robert Stuzer	Director	EFG Private Bank Limited	United Kingdom
Ross Anders	Financial Planner - Partner	Tilney	United Kingdom
Rume Oshenye	Manager (Personal Tax)	Buzzacott	United Kingdom
Sarah Cuff	Tax Senior manager	Grant Thornton UK LLP	United Kingdom
Shahrzad Atai	Managing Director	Alvarium Private	United Kingdom
Shaikha Al Jalahma	Solicitor	Trowers & Hamblins	United Kingdom
Simon Davis	Director of Wealth Management	Charles Stanley	United Kingdom
Simon Miller	Senior Manager	Smith & Williamson LLP	United Kingdom
Sophie Spencer	Private Clients Business Development	Sarasin & Partners LLP	United Kingdom
Stephanie Panayi	Investment Promotion Officer	Cyprus Investment Promotion Agency	Cyprus
Stephen Browne	Director, Head of Marketing	Waverton Investment Management Limited	United Kingdom
Stephen Rothwell	Business Partner	Sarasin & Partners LLP	United Kingdom
Steve Skelding	Head of Wealth Management	Octopus Investments	United Kingdom
Steven Powell	Business Development Director	Deepbridge Capital	United Kingdom
Sunita Jalaf	Business Manager	Lloyds Bank Corporate Markets plc	United Kingdom
Suzanne Reisman	Principal	Suzanne M Reisman	United Kingdom
Thomas Hardy	Investment Manager	Ruffer	United Kingdom
Tina Westwood	Vice President	Maples Group	United Kingdom
Todd Cowan	Wealth Manager - US Connected	LGT Vestra US	United Kingdom
Tom Hawkins	Director, Investment Management	Tilney	United Kingdom
Tommy Roy	Senior Tax Manager	Smith & Williamson LLP	United Kingdom
Tracy Leach	Business Development Consultant	Moran Private Client Practice	United Kingdom
Xenia Ilyasova	Director	Crossroads Partners	United Kingdom

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