



GUEST LIST

Breakfast Panel: Relocation and Mobility for HNW Clients

No. 1 London Bridge, London

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Tuesday, 10 September 2019

Name	Position	Company
Host:		
David Bell	Founder	PCD Club
Panellists:		
Ken Chapman	Head of Wealth Planning	EFG Private Bank Limited
Anjali Raval	Associate	Howard Kennedy
Antonia Torr	Head of Immigration	Howard Kennedy
Daniel Coleman	Investment Director	Canaccord Genuity Wealth Management
Thomas Serizay	Private Wealth Advisor	Banque Lombard Odier & Cie SA
Guests:		
Alex Balfour	Associate Director	Smith & Williamson Investment Management
Alice Johnson	Solicitor, Private Client	Druces LLP
Andrew Aldridge	Partner, Head of Marketing	Deepbridge Capital
Arianna Magrini	Consultant	Hoffen West Real Estate
Ben Gilbert	Associate Partner	Sarasin & Partners LLP
Bill McGilivray	Head of Client Development	Ogier
Bill Wilkinson	Director	Wilkinson and Fox
Brian Dimitroff	Director	EFG Private Bank Limited
Catherine Whyte	Senior Manager	EFG Private Bank Limited
Claire Barry	Director	Blue Hour Communications
Conor Boyd	Associate	Kingsley Napley LLP
Craig Thomson	Director	Grant Thornton UK LLP
Daniel Chopping	Wealth Planner	EFG Private Bank Limited
Daniela Jaume	Business Development Manager	James Hambro & Partners
Danny Oceans	Revenue Manager	Hemonto
Darren Lees	Financial Planner	Carbon Financial Partners Limited
David Treitel	Managing Director	American Tax Returns Ltd
David Conway	Senior Manager (Personal Tax)	Buzzacott
David Johnson	Assistant Director	EFG Private Bank Limited
David Johnson	Managing Director	INHOUS Ltd
Dominic Lacey	Director, Financial Planning	Tilney
Donna Shorto	Director	PraxisIFM Trust Limited
Edward Towers	Director	Aykroyd & Co
Emily Mailer	Partner	Howard Kennedy
Fabio Rinaldi	Business Development	UBS
Farzin Yazdi	Head of Investor Visa	Shard Capital Partners LLP
Helena Luckhurst	Partner	Fladgate LLP
Hugh Wade-Jones	Managing Director	Enness
Iain Aitken	Senior Associate	Trowers & Hamblins
Irpreet Kohli	Director	Freeths LLP
Izzy Walsh	Head of London	Hall Brown
Jack Morris	Professional Services Consultant	Fusion Consulting
James Leavey	Senior Manager	Apex Funds Services UK
James von Simson	Investment Director	Tilney
Jane Amphlett	Partner	Howard Kennedy
Jason Mathew	Senior Tax Manager	US Tax & Financial Services
Jay Carpenter	Client Manager	GAM Investments
Jay Soneji	Partner and Head of Real Estate	Sheridans
Jill Carpenter	Trust Director	Rawlinson & Hunter (Singapore)
Jinu Mathew	Strategic Partnerships Director	SIRE Properties
Jonathan Benson	Director	EFG Private Bank Limited
Jordan Byman	Client Portfolio Manager	Aberdeen Standard Capital
Julien Ward	Associate Director - Private Office	Savills Private Office
Justin Mason	Director	Justin Mason Valuation Consultancy
Katie Newbury	Senior Associate	Kingsley Napley LLP
Kelly Whiter	Partner	Fladgate LLP
Leigh Sayliss	Partner	Howard Kennedy

Name	Position	Company
Liz Palmer	Partner	Howard Kennedy
Louise Chilcott	Business Development Executive	BTR International
Louise O'Toole	Associate	Gateley Plc
Marc Acheson	Global Wealth Specialist	Utmost
Marco Evans	Senior Client Portfolio Manager	Aberdeen Standard Capital
Maria Lukanova	Senior Associate - International Wealth and Cyprus desk	PwC UK
Mark Davies	Managing Director	Mark Davies Associates
Martin Rankin	Associate Director	Smith & Williamson
Matthew Duncan	Consultant	Druces LLP
Matthew Allen	Director - Private Wealth Services	JTC Group
Melanie Hart	Partner	Ince Gordon Dadds LLP
Melanie Chan	Private Client Tax Manager	Smith & Williamson
Naomi O'Higgins	Partner	Howard Kennedy
Natalie Martin	Tax Director	PwC LLP
Natasha Willis	Head of Property Management	Aykroyd & Co
Nathan Prior	Partner & Head of International	Partners Wealth Management LLP
Neil West	Director	Hoffen West Real Estate
Nicholas Palmer	Investment Director	Peregrine & Black
Nick Wood	Business Partner	Sarasin & Partners LLP
Nicky Oliver	Director	E3 Consulting
Nicolas Liaigre	Senior Wealth Planning Consultant	Lombard International Assurance S.A.
Nina Lake	Associate	Child & Child
Ogoona Agwa	Assistant Manager (Personal Tax)	Buzzacott
Olga Nechita	Solicitor and Senior Manager	PricewaterhouseCoopers LLP
Oliver Brind	Head of Business Development	Aperio Intelligence Limited
Oliver Hart	Senior Private Banker	Lombard Odier
Peter Milnes	Managing Director	Rawlinson & Hunter (Singapore)
Philippa Whatley	Associate Partner	St. James's Place Wealth Management
Rafael Steinmetz Leffa	Client Relationship Manager	Shard Capital Partners LLP
Richard Stanwell	Director	EFG Private Bank Limited
Richard Merriman	Managing Director	R P Merriman British & International Education Ltd
Richard Villiers		
Rosemary Wright	Group Business Development	Oak Group (IOM) Limited
Rupert Hoffen	Director	Hoffen West Real Estate
Rupert Clarey	Partner	Maitland
Ryan Conlon	Senior Tax Manager	ETC Tax
Sean Costello	CEO & Founder	Synapse Global Ltd
Seema Dodhia	Associate Director	BDO
Sianne Haldane	Head of Planned Giving Philanthropy	Cancer Research UK
Soledad Garcia	Director	Zedra
Sophie Shaladi	Senior Associate	Blake Morgan
Sophie Mazzier	Counsel	Maurice Turnor Gardner LLP
Sophie Spencer	Private Clients Business Development	Sarasin & Partners LLP
Stephen Heinemann	Partner	Howard Kennedy
Stephen Browne	Director, Head of Marketing	Waverton Investment Management Limited
Stuart Wright	Senior Private Banker	Banque Lombard Odier & Cie SA
Sunita Jalaf	Business Manager	Lloyds Bank Corporate Markets plc
Tanya O'Carroll	Operations Director	Oak Group (IOM) Limited
Tom Powell-Tuck	Portfolio Manager	GAM Investments
Tom Hind	Business Development Manager	Stellar Asset Management
Tony Wassell	Financial Adviser	Partners Wealth Management LLP
Vanessa Kistoo	Director	Blick Rothenberg
Vincent Chung	Solicitor	Dixcart Legal
Will Wood	Client Portfolio Manager	Aberdeen Standard Capital

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