An invitation to the Lyndhurst Personal Finance Conference 2024

LYNDHURST

PLAN • INVEST • PROTECT

The world is changing - are you ready?

Rothamsted Research Conference Centre
Friday 8th November 2024
8:45 am to 1:30 pm – buffet lunch included

PLEASE BOOK EARLY TO AVOID DISAPPOINTMENT

Register Here

The world is moving at a fast pace with both exciting opportunities and risks on the horizon. The changes across the globe, politically, economically, and financially, not to mention in terms of technology, impact us all. At Lyndhurst Financial Management we continue to adapt and support you during these times, helping to make sense of a changing world and positioning you for success.

We are proud and delighted to again welcome a team of such eminent speakers, some new to our event and others back by popular demand. We hope you will agree that our prestigious line-up of speakers this year is very exciting, and their presentations promise to be thought-provoking, informative and reassuring.

We are also proud to announce that we have again been nominated and short-listed for ***Investment Adviser of the Year*** in the ***2024 Investment Life and Pensions Moneyfacts awards***. This is extremely important to us as it is a testament to the growing strength of the Lyndhurst name and investment proposition. Last year we had some phenomenal testimonials from the fund management industry, clients, and introducers to support our nomination and we have promises of the same for this year. So watch this space!

We will also be hosting an 'in-house' question and answer session, with various members of our team answering questions that our clients commonly ask at their review meetings and have posed to us at this time. These will relate to a wide range of topics, and there will be opportunities to meet the Lyndhurst team and speakers during the event.

Our conference is free of charge and is open to our clients, together with their friends and family, and will also be advertised in the local area at a later date. As seats are limited, we would encourage you to register your interest in attending as soon as possible to avoid disappointment. Last year we were at full capacity so early booking is recommended.

To register your interest please complete the Registration Form with your name and contact details and any dietary requirements. We look forward to seeing you there!

Lyndhurst Financial Management Limited is authorised and regulated by the Financial Conduct Authority

LYNDHURST
PLAN • INVEST • PROTECT

Luke Bartholomew: Deputy Chief Economist, abrdn
Updates on the investment market and outlook for the global economy

Luke is abrdn's Deputy Chief Economist, working in Global Macro Research. Before joining the team, he worked as an Investment Strategist on the Economics and Thematic Research Team and as an Investment Manager in fixed income. Luke graduated from Oxford University in Philosophy, Politics and Economics and with a MSc from the London School of Economics.

Luke Barrs: Global Head of Fundamental Equity Client Portfolio Management, Goldman Sachs Asset & Wealth Management
Evolving trends in international relations and the economic security of markets

- *Luke is global head of client portfolio management for Fundamental Equity within Goldman Sachs Asset Management. Luke is also a senior client portfolio manager, advising clients on their strategic asset allocation and equity investment decision-making process, particularly related to gaining appropriate access to emerging markets and other long-term secular growth themes.*

Andy Marsh: Fund manager, Artemis Fund Managers
'Is the UK investment market dwindling or the next exciting investment opportunity'

- *Andy trained with Ernst & Young and qualified as an accountant in 1997 before working as an analyst for ING Charterhouse and then Merrill Lynch. Following lead positions at Investec Investment Bank and Polar Capital, Andy joined Artemis' income team in 2018. With over 20 years' experience in financial markets, Andy now works within one of the most respected UK-focused equity investment teams in the industry, who collectively manage around £11billion of assets.*

Sarah Albury: Of Counsel, Mishcon de Reya LLP
'Inheritance tax planning opportunities'

- *Sarah is Of Counsel in Mishcon Private and is a specialist in Tax & Wealth Planning. She advises UK and international clients about their roles as trustees, executors and beneficiaries and on their personal estate planning with a particular emphasis on US-UK matters. Sarah was named as "One to Watch" in Legal Week's Private Global Elite 2021 and shortlisted for Cross-Border Estates – Solicitor of the Year – UK. From offices in London and overseas, Mishcon De Reya counsel clients around the world and in March 2017, the firm was announced Law Firm of the Year at the Legal Business Awards.*

Stuart Podmore: Investment Propositions Director, Schroders
'The 3D reset: Demographics, De-globalisation, De-carbonization'

- *Stuart presents and broadcasts to clients globally on Markets, Macroeconomics, Geopolitics and Behavioural Finance both from the Schroders studio and in person at conferences. He joined Schroders in 2015 as Investment Propositions Director after over 15 years in investment at Barclays and JPMorgan Asset Management where latterly, he worked as Client Portfolio Manager in Global Fixed Income.*

Philip Dean: Senior Partner Hicks and Company Chartered Accountants
'Tax planning opportunities'

- *A familiar name locally, Philip is Senior Partner at Hicks and Company Accountants with whom we at Lyndhurst have been closely affiliated for many years. Philip joined Hicks as a manager in 2001 and became a partner in 2007, taking over from our current Managing Director, Martin Corrie, as senior partner at Hicks in 2020.*

Cherry Reynard: Award-winning news and features journalist, specialising in investment journalism and finance topics

- *Cherry co-authored a book on investing in emerging markets and is a six-time winner of the Investment Management Association's freelance journalist of the year award. Cherry has written for a range of publications including The Financial Times, The Telegraph, The Independent and Forbes.*