



Elizabeth Bastin

Elizabeth is currently a Vice President for a major global Bank, with a solid background in financial regulation, compliance, and legal risk, spanning over 10 years. She has advised various major financial institutions on compliance and legal risk matters, including high profile investigations commissioned by the FCA and other global Regulators.

She specialises in advising financial institutions on how to meet their obligations under Deferred Prosecution Agreements (DPA) and has successfully brought compelling evidence before Regulators to enable Financial Institutions to close out DPAs.

Elizabeth is a financial inclusion and social mobility advocate; she is the co-founder of a social enterprise providing financial education and employability support to individuals from underserved backgrounds. Her commitment to creating and instilling change for the underserved has led to her achieving Fellow status from the Royal Society of Arts.



Gordon Wilson APFS

Gordon Wilson is founder and MD of Carbon Financial Partners, a financial planning and investment business which began trading in June 2011. Carbon has offices in Aberdeen, Perth, Glasgow, Edinburgh and London. The team of 40 includes 13 financial planners.

Prior to Carbon, Gordon was MD and an owner of Perth based Thomson Shepherd, which was sold in 2008 to Skipton Building Society.

Carbon strives to be the very best business it can be, and has achieved national recognition through:

- Chartered Financial Planners of the Year 2015
- Gold Standard for Independent Financial Advice 2013 - 2019
- CISI Recognising Excellence Award Finalist 2013, 2014 and 2015
- Professional Adviser – Adviser Firm of the Year (UK) 2015

Gordon is a Chartered Financial Planner. He is passionate about openness and transparency and the benefits it brings to clients and businesses alike. A strong advocate of the value of financial planning, Gordon runs an evidence-based business where challenge, debate, teamwork and personal development are all strongly supported and encouraged.

Gordon has spoken at seminars and conferences at home and abroad on how to manage and grow 'new model' adviser businesses.

He is a member of the Young Presidents' Organisation (YPO).

Gordon is a High Constable of Perth where he lives with his wife Aileen, daughter Hannah, sons Finlay and Forbes, West Highland Terrier, Flora and Luther the Pug.

In his spare time, Gordon is a keen golfer, fisherman, skier, cyclist, dog walker and rugby fan.



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Biographical Notes



Anthony Ward BSc, FPFS

Anthony has held a variety of roles across his 17 years in the industry and is passionate about Financial Planning and its benefits to individuals and society.

Currently, he is a member of the Senior Leadership Team at Barclays Wealth and as the Wealth Planning Head of Distribution he is also responsible for the strategic direction and growth of the business.

As a Fellow of the Personal Finance Society and a Chartered Financial Planner, prior to joining Barclays Anthony had a successful career as an IFA gaining experience at major Accountancy firms and Private Banks. He has been actively involved with both PFS and CII committees and worked as both an examiner and trainer.

Anthony is married with 3 young daughters and in his spare time likes to stay active and play a variety of sports.