

Asset Management Breakfast Briefing

Beyond the Barriers: Growth and Transformation Strategies for Asset Managers

Wednesday 24th September, 8.00-10.00, Alvarez & Marsal, Park House, 16-18 Finsbury Circus, London EC2M 7EB

0800-0815	BREAKFAST & NETWORKING
0815-0830	INTRODUCTION. <i>Alan Coutts, Managing Director, Wealth & Asset Management EMEA Alvarez & Marsal</i>
0830-0915	BEYOND ORGANIC GROWTH: COMPETING FOR SCALE AND RELEVANCE IN ASSET MANAGEMENT As structural pressures intensify in a consolidating market, asset managers must confront hard questions about growth, scale, and long-term competitiveness, which requires a critical re-evaluation of outdated assumptions around structure and shareholder value. This session will look at what it takes for mid-to-large asset managers to thrive in this environment, and whether growth should come from acquisition, organic differentiation, or strategic partnership, by asking: • How much scale is truly needed to avoid becoming “fodder” for acquisition – and explore alternative ways to remain competitive without it? • Why do private equity investors remain cautious about asset management platforms, and what would make the model more attractive and resilient? • What are the do’s and do not’s of integration when buying for growth, particularly in private markets and alternatives? • How can asset managers collaborate to reduce duplication, manage cost-income pressures, and develop joint go-to-market solutions? <i>Silvan Schriber, Managing Director, Alvarez & Marsal</i>
0915-1000	BREAKING THE TRANSFORMATION BLOCKERS IN ASSET MANAGEMENT Asset managers are under pressure to grow, differentiate, and deliver at speed – yet too often, transformation projects stall before delivering tangible value, with around 70% of technology in financial services failing to meet expectations. This session will examine the stubborn barriers – from strategy misalignment, cultural inertia, and implementation challenges in order to identify the enablers of successful transformation, such as; • Embedding a culture of experimentation to deliver results incrementally before committing to full-scale rollouts. • Aligning technology strategy with business outcomes while avoiding common pitfalls like vendor lock-in and fragmented data architecture. • Committing to shared outcomes through risk-sharing partnerships and commercial innovation. • Implementing AI and automation: what works and what doesn’t. <i>Dewi Rees, Senior Director, Alvarez & Marsal</i>
1000-1030	CLOSING REMARKS FOLLOWED BY NETWORKING

BreakfastBriefing

WHAT IS THE CONTEXT OF THESE BRIEFINGS?

We are delighted launch this series for the C-Suite of mid to large Asset Managers in the UK. The idea is to provide a platform for the key decision makers and their peers to strategise together about the biggest challenges facing their business and the industry, and ultimately try to find ways to collaborate and drive change forward.

PARTICIPANT LIST

- **Asset Management One International** – *Chief Operating Officer*
- **Brown Advisory** - *Head of International Operations*
- **CG Asset Management Limited** - *Chief Operations Officer*
- **Fundsmith** - *Head of Operations*
- **Guinness Asset Management** - *Chief Executive Officer*
- **Hassium Asset Management LLP** - *Managing Director*
- **Impax Asset Management** – *Chief Operating Officer, Executive Director*
- **Julius Baer International Ltd** - *Chief Operating Officer*
- **Latitude Investment Management LLP** - *Chief Operating Officer*
- **Rathbones Group PLC** - *Investment Management Chief Operating Officer*
- **RBC BlueBay Asset Management** - *Chief Operating Officer*
- **Ruffer LLP** - *Chief Technology Officer*
- **Sarasin & Partners LLP** - *Partner, Chief Operating Officer*
- **Tatton Investment Management** - *Chief Operating Officer*
- **Troy Asset Management** - *Chief Operating Officer*
- **WIM (Was London and Capital & Waverton IM)** - *Director & Head of Operations*
- **Wellington Management International Ltd** - *Vice President, Global Fund Data Manager*

EXPERTS & ORGANISERS

- **Alvarez & Marsal** – *Alan Coutts, Managing Director Wealth & Asset Management EMEA*
- **Alvarez & Marsal** - *Silvan Schriber, Managing Director*
- **Alvarez & Marsal** - *Dewi Rees, Senior Director*
- **Owen James Group** – *James Goad, Managing Director*
- **Owen James Group** – *John Hall, Senior Delegate Manager*
- **Owen James Group** – *Rebecca Leitch, Conference & Content Manager*