

Asset Management Breakfast Briefing Performance, Platforms and People: Redefining the Asset Manager

Wednesday 8th July, 8.00-10.00, Alvarez & Marsal, Park House, 16-18 Finsbury Circus, London, EC2M 7EB

0800-0815	BREAKFAST & NETWORKING
0815-0825	INTRODUCTION. Alan Coutts, Managing Director Wealth & Asset Management EMEA, Alvarez & Marsal
0830-0915	FROM DATA TO DECISIONS: SCALING AI IN ASSET MANAGEMENT As AI moves beyond experimentation into core investment and operational processes, asset managers face increasing pressure to turn data into actionable insight - without compromising governance, control, or regulatory alignment. So how can firms scale AI effectively while managing model risk, bias, and accountability? This session will explore how firms can embed it into decision-making frameworks while maintaining robust oversight, by asking: • How are leading firms moving from isolated AI use cases to enterprise-wide adoption? • What does “decision-grade” data look like, and how can firms overcome fragmentation? • Where should AI augment human judgement versus automate decision-making entirely? • How can governance frameworks evolve to ensure transparency, explainability, and auditability? • Where does accountability sit when AI influences or makes investment decisions? <i>With Pierre Legrand - Managing Director, Alvarez & Marsal</i>
0915-1000	WINNING THE WAR ON TALENT: EVOLVING CULTURE AND SKILLS As competition for talent intensifies and skill requirements rapidly evolve, asset managers must rethink how they attract, develop, and retain the workforce of the future. With AI, data, and technology reshaping roles, how can firms build cultures and capabilities that remain competitive? This session will explore how firms are adapting their talent strategies to a changing landscape, by asking: • How is the employee value proposition shifting in a more flexible, purpose-driven environment? • What cultural attributes are most effective in attracting and retaining next-generation talent? • How are roles evolving as investment, data, and technology capabilities converge? • What approaches to upskilling and reskilling are proving effective at scale? • How can firms retain critical talent beyond compensation, through career pathways, purpose, and engagement? <i>With Adam Croutear – Senior Director, Alvarez & Marsal</i>
1000-1030	CLOSING REMARKS FOLLOWED BY NETWORKING

BreakfastBriefing

WHAT IS THE CONTEXT OF THESE BRIEFINGS?

We are delighted to continue 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 Ltd** - Mario De Bergolis, *Chief Operating Officer*
- **BNP Paribas Asset Management** - Michaela Munro, *UK COO Alternatives*
- **Brown Advisory** - Ben Albone, *Head of International Operations*
- **Federated Hermes** - Adam Jackson, *Head of Operations*
- **Fundsmith** – Nick Rakowski, *Head of Operations*
- **Guinness Asset Management** - Nick Martin, *Chief Operating Officer*
- **Impax Asset Management** - Darren Johnson, *Chief Operating Officer, Executive Director*
- **Julius Baer International** – Adam Waller, *Head of Middle Office*
- **Liontrust** - Edward Catton, *Chief Operating Officer, Partner*
- **M&G Investments** – Helen Taylor, *Director of Asset Manager Operations*
- **Crown Agents Investment Management (part of Momentum)** – Anna Chan, *Head of Operations*
- **Oldfield Partners LLP** - Chris Driver, *COO & Partner*
- **Rathbones Group PLC** - Pat Hemphill, *Head of Business Enablement*
- **Sarasin & Partners LLP** - Hadley Simons, *Chief Operating Officer, Client Affairs*
- **Seilern Investment Management Ltd** - Stuart Gunderson, *COO, Compliance Officer & MLRO*
- **Wellington Management International Ltd** - Stuart Smith, *Vice President, Global Fund Data Manager*

EXPERTS & ORGANISERS

- **Alvarez & Marsal** – Alan Coutts, *Managing Director Wealth & Asset Management EMEA*
- **Alvarez & Marsal** – Pierre Legrand, *Managing Director*
- **Alvarez & Marsal** – Adam Croutear, *Senior 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*