

CEO Wealth Management & Private Banking Dinner X

THE NEW REALITIES FOR CAPITAL, CLIENTS AND GROWTH

4th March 2026 (1830-2130 followed by networking drinks) – Walbrook Club, 37A Walbrook, London EC4N 8BS

18:30-19:00	WELCOME DRINKS
19:00-19:10	<p>WELCOME</p> <p>An outline of the objectives of the CEO Dinner Series</p> <p><i>Dave Mason, Managing Director at Solve Partners and James Goad, Managing Director at Owen James</i></p>
19:10-20:00	<p>NEXUS: INVESTMENT STRATEGY IN A WORLD OF STRUCTURAL CHANGE</p> <p>The geopolitical and economic landscape is undergoing a profound change in a series of complex, interconnected ways. In conjunction with structural changes in AI, demographics, defence and climate transition, financial markets are being reshaped.</p> <p>The underlying assumptions that have guided investment decisions for the past two decades (or more) need to be stress-tested as investors recalibrate portfolios to address the new realities, replete with both risks and opportunities.</p> <p><i>Expert: James Ashley, Managing Director, Head of International Market Strategy & Head of Strategic Advisory Solutions, Goldman Sachs Asset Management</i></p>
20:00-21:00	<p>SOURCING NEW CLIENTS & DRIVING ORGANIC GROWTH</p> <p>Organic growth remains the defining challenge for wealth managers, with firms under mounting pressure to professionalise their approach to acquisition, strengthen adviser productivity, and build consistent, repeatable engines of growth.</p> <p>This session will draw on market insight across the entire topography of onshore savings and investments to see where the largest pool of assets are, which are attracting the largest flows, which households own them and how these have evolved over time.</p> <p>We'll explore how leadership teams are defining and executing growth strategies built on extensive sector expertise, deep experience working with data sources and broader factors that have shaped savings and investment products and patterns since the mid-90s.</p> <p><i>Expert: Penney Frohling, Partner & Founder, Ethos with Solve Partners</i></p>
21:00-21:30	THANK YOU FOLLOWED BY NETWORKING DRINKS – Key conclusions

DinnerBriefing

What is the context of these Briefings?

We are delighted to have been asked to relaunch this series of bi-annual dinners targeting the Chief Executive Officers from the leading private banks and wealth managers. The idea is to provide a platform for CEOs and their peers to strategise together about the biggest challenges facing their business and the industry and ultimately try to find ways in which we can collaborate to drive change forward.

Participant List

- **Ascot Lloyd** - *Chief Executive Officer*
- **Beckett Investment Management** - *Chief Executive Officer*
- **BRI Wealth Management PLC** - *Chief Executive Officer*
- **EQ Investors Limited** - *Joint Chief Executive Officer*
- **In Partnership Financial Advisers Limited** - *Chief Executive Officer*
- **Kingswood** - *Chief Executive Officer*
- **MASECO Private Wealth** - *Managing Partner*
- **Nedbank Private Wealth** - *Chief Executive*
- **Raymond James Wealth Management** - *Chief Executive Officer*
- **Schroder Wealth Management US Limited** - *Chief Executive Officer*
- **UBS Wealth Management UK** - *Executive Director*
- **Weatherbys Banking Group** - *Group Chief Executive*
- **Willis Owen Limited** - *Managing Director*

Experts & Organisers

- **Goldman Sachs Asset Management** - *James Ashley, Managing Director, Head of International Market Strategy & Head of Strategic Advisory Solutions*
- **Ethos** - *Penney Frohling, Partner & Founder*
- **Solve** – *Donald Reid, Founder*
- **Solve** - *Dave Mason, Managing Director*
- **Owen James Group** - *James Goad - Managing Director*
- **Owen James Group** - *Rebecca Leitch, Conference & Content Manager*