

## CFO Wealth Management & Private Banking Breakfast Briefing XXX

### DESIGNING THE MODERN WEALTH FIRM: GROWTH, TECHNOLOGY AND OPERATIONAL EXCELLENCE

15<sup>th</sup> January, 2026 (0800-1000) – Walbrook Club, 37A Walbrook, London EC4N 8BS

0800-0810	<b>WELCOME</b> The objectives of the CFO Briefing Series and recap on topics discussed at the last briefing. <i>With Dave Mason, CEO at Solve Partners</i>
0810-0900	<b>SOURCING NEW CLIENTS &amp; DRIVING ORGANIC GROWTH</b> 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.  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.  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.  <i>Expert: Penney Frohling, Partner &amp; Founder, Ethos</i>
0900-0915	<b>COFFEE AND NETWORKING</b> Opportunity to stretch your legs and network with your peers
0915-0955	<b>STRATEGIC TECHNOLOGY DECISIONS FOR SCALABLE GROWTH</b> As firms pursue organic growth and navigate consolidation, CFOs are under increasing pressure to modernise the technology and operating model foundations. This session will explore the strategic decisions that determine whether technology becomes an enabler of growth - or a barrier to it, by focusing on the four areas shaping the next phase of transformation: <ul style="list-style-type: none"><li>• <b>Build vs. Buy:</b> How CFOs should evaluate cost, speed, differentiation and long-term control when deciding between in-house development and external solutions.</li><li>• <b>Vendor Landscape &amp; Innovation:</b> What shifts are occurring in the wealth and finance technology market, and how can CFOs assess vendor stability, innovation trajectory and partnership potential?</li><li>• <b>Strategic Partnerships:</b> What governance, risk and performance frameworks are needed to ensure technology partnerships deliver sustainable value?</li><li>• <b>Outsourcing &amp; BPO Trends:</b> How can firms balance efficiency with regulatory obligations, operational resilience and consistent client experience?</li></ul> <i>Expert: Solve</i>
0955-1000	<b>THANK YOU &amp; WAVE GOODBYE</b> – Key conclusions

# BreakfastBriefing

## What is the context of these Briefings?

This series of briefings for the Chief Finance Officers from the leading private banks and wealth managers continues to offer a platform for peers to network, hear from the experts and seek solutions to the business issues with which they grapple on a day-to-day basis. These briefings explore topics such as how to manage cost income ratios more effectively; examine different aspects of the customer journey; as well as learn how to keep the regulator happy and provide a high-quality service.

## Participant List

- **Atomos**, *Chief Financial Officer*
- **Canaccord Wealth**, *Group Head of Finance*
- **Handelsbanken plc**, *Deputy Chief Financial Officer*
- **Investec Wealth & Investment (UK)**, *Finance Director*
- **Julius Baer & Co. Ltd**, *Chief Financial Officer*
- **Killik & Co**, *Partner, Chief Financial Officer*
- **LGT Wealth Management**, *Finance Director*
- **MASECO Private Wealth**, *Chief Financial Officer*
- **MKC Wealth Ltd**, *Chief Financial Officer*
- **Rathbones Investment Management Limited**, *Chief Financial Officer*
- **Saltus Partners LLP**, *Chief Financial Officer*
- **Saranac Partners Limited**, *Finance Director*
- **Stanhope Capital LLP**, *Partner, Group Chief Financial Officer*
- **True Potential Wealth Management LLP**, *Chief Financial Officer*

## Experts & Organisers

- **Solve** - Dave Mason, *Managing Director*
- **Solve** - Donald Reid, *Founder*
- **Ethos** - Penney Frohling, *Partner & Founder*
- **Owen James Group** - James Goad, *Managing Director*
- **Owen James** - Mark Davison, *Relationship Manager*
- **Owen James Group** - Rebecca Leitch, *Conference & Content Manager*