BreakfastBriefing

CFO Wealth Management & Private Banking Breakfast Briefing XXXIII

THE NEXT ERA OF VALUE CREATION – TURNING GROWTH INTO SUSTAINABLE PROFITABILITY

Thursday 17th September, 2026 (0800-1000) – Walbrook Club, 37A Walbrook, London EC4N 8BS

0800-0810	**WELCOME** The objectives of the CFO Briefing Series and recap on topics discussed at the last briefing. *With Dave Mason, CEO at Solve Partners*
0810-0900	**THE NUMBERS DON'T LIE: Where are the UK's most profitable wealth businesses creating value?** The wealth management sector has enjoyed strong market performance, rising assets and significant consolidation over recent years. But beneath the headline growth, financial performance varies considerably between firms. Drawing on the financial results of listed wealth managers, consolidators and advice businesses, this session will provide an independent view of where value is really being created across the sector, including: • What the latest financial results reveal about the health of the wealth management sector • Which firms appear best positioned for future growth and why • Where the strongest margins and returns are being generated • Which business models are proving most resilient as costs continue to rise • The biggest financial warning signs and opportunities emerging across the sector • What CFOs can learn from the sector's highest-performing businesses *Speakers to be announced (finance sector analyst from an Investment Bank)*
0900-0915	**COFFEE AND NETWORKING** Opportunity to stretch your legs and network with your peers
0915-0955	**FROM AI AMBITION TO FINANCIAL IMPACT: Proving the return on technology investment** AI has rapidly moved from experimentation to strategic priority, with significant investment being directed towards automation, productivity and business transformation. As adoption increases, the challenge for CFOs is understanding which investments will deliver measurable commercial value - and which risk adding further cost and complexity. This session will explore: • How to move from AI ambition to measurable financial outcomes • Where productivity gains can translate into improved profitability • How to evaluate ROI across technology and transformation programmes • Avoiding investment that adds new capability without removing legacy cost • How AI could reshape future operating models and cost structures *Speakers to be announced from Solve*

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0955-1000	**THANK YOU & WAVE GOODBYE** – Key conclusions

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*

Handelsbanken plc - *Deputy Chief Financial Officer*

Independent Consultant

Independent Consultant

Rathbones - *Finance Director*

Julius Baer & Co. Ltd - *Chief Financial Officer*

Killik & Co - *Deputy Chief Financial Officer*

LGT Wealth Management - *Finance Director*

MASECO Private Wealth - *Chief Financial Officer*

MKC Wealth Ltd - *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*
- **Owen James Group -** James Goad, *Managing Director*
- **Owen James Group** - Mark Davison, *Relationship Manager*
- **Owen James Group** - Rebecca Leitch, *Conference & Content Manager*

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