

BreakfastBriefing

COO Wealth Management & Private Banking Breakfast Briefing XLVIIV

Thursday 1 May 2025 (1600-1800) – Andaz Hotel, 40 Liverpool St, London EC2M 7QN

0805-0815	WELCOME Outline the objectives of the COO Briefing Series and recap on topics discussed at the last briefing. <i>Dave Mason, CEO at Solve Partners</i>
0815-0900	<i>AI in Wealth Management – examining tangible AI use cases that drive productivity as well as real-world AI applications with Eddie Russell, Solve.</i>
0900-0915	COFFEE AND NETWORKING Opportunity to stretch your legs and network with your peers
0915-0955	<i>Build vs Buy. Key lessons from Scandinavia on in-house AI capabilities with Nick Raine (Soderberg) also need an example of a wealth-led build</i>
0955-1000	THANK YOU AND WAVE GOODBYE – Key conclusions

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What is the context of these Briefings?

This series of briefings for the Chief Operating Officers from the largest 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** – Operations Director & Head of Systems and Technology
- **Bank J. Safra Sarasin Ltd** - Chief Operating Officer, London Branch
- **Border & Cie (UK) PLC** – Chief Operating Officer
- **Brooks Macdonald Asset Management Ltd** - Chief Technology Officer
- **Brown Advisory** - Head of International Private Client Operations
- **Brown Shipley & Co Ltd** – COO Transformation Specialist
- **Canaccord Genuity Wealth Planning Ltd** – Chief Operating Officer
- **Cazenove Capital Management Ltd** - Chief Operating Officer, UK Wealth Management
- **Finli Group** - Chief Operating Officer
- **Fundsmith** – Head of Operations
- **Handelsbanken Asset Management** - Chief Operating Officer
- **HFMC Wealth Management Ltd** – Chief Operating Officer
- **Hurst Point Group** – Chief Technology & Transformation Officer
- **Irwin Mitchell** – Chief Operating Officer
- **James Hambro & Partners LLP** - Chief Operating Officer
- **JM Finn & Co Ltd** - Chief Operating Officer
- **Julius Baer International Ltd** - Chief Operating Officer
- **Killik & Co** - Strategic Operations Director
- **Killik & Co** - Chief Operating Officer
- **Lincoln Private Investment Office** – Chief Operating Officer

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- **MASECO Private Wealth** – *Chief Operating Officer*
- **Perspective Financial Group Ltd** – *Chief Operating Officer*
- **Rathbones Group Plc** – *Head of Strategy & Architecture*
- **RBC (Royal Bank of Canada) Wealth Management International** - *Chief Operating Officer*
- **Rothschild & Co** - *COO of Investments*
- **Saranac Partners Limited** - *Head of Operations & Onboarding*
- **Sarasin & Partners LLP** – *Client Affairs Business Manager, Associate Partner*
- **Schroders Plc** - *Head of Business Consultancy*
- **Söderberg & Partners** – *Chief Executive Officer*
- **Stifel** - *Chief Operating Officer*
- **Tideway Investment Partners** – *Chief Executive Officer*
- **Timothy James & Partners** – *Chief Operating Officer - Financial Planning Operations*
- **Waverton Investment Management Ltd** - *Chief Operating Officer*
- **Waverton Investment Management Ltd** - *Director & Head of Operations*
- **Wren Investment Office Ltd** – *Chief Operating Officer*

Experts & Organisers

- **Solve** – Becky Colegrave, *Director*
- **Solve** – Dave Mason, *Managing Director*
- **Solve** – Karl Cranswick, *Director*
- **Rathbones Group Plc** - Andy Brodie, *Chief Operating Officer*
- **FoxRed Insight** – Gilly Green, *Director*
- **Owen James Group** – John Hall, *Senior Delegate Manager*
- **Owen James Group** – Rebecca Leitch, *Conference & Content Manager*
- **Owen James Group** – Georgia Edwards, *Event Support Officer*