

Breakfast Briefing

COO Wealth Management & Private Banking Breakfast Briefing

SCALING CHANGE, STRENGTHENING TRUST: INNOVATION AND CYBER RESILIENCE FOR THE NEXT ERA OF WEALTH MANAGEMENT

Tuesday 20th January 2026 (0800-1000) – Andaz Hotel, 40 Liverpool St, London EC2M 7QN

0800-0815	<p>NETWORKING & WELCOME</p> <p>Objectives of the COO Briefing Series and recap on topics discussed at the last briefing. <i>With Dave Mason, CEO at Solve Partners and James Goad, Managing Director at Owen James</i></p>
0815-0845	<p>CHANGE DELIVERY & INNOVATION - HOW WEALTH MANAGERS ARE MODERNISING TRANSFORMATION</p> <p>As firms face rising regulatory pressure, cost constraints and the need for scalable operating models, COOs are rethinking how change is delivered. Agile squads, product-led structures and embedded change teams are becoming more common - but maturity varies, and many firms still struggle to turn intent into measurable outcomes.</p> <p>This session will explore how leading organisations are redesigning their change and innovation engines - and COOs sharing examples of best practice - to discuss:</p> <ul style="list-style-type: none"> • Moving from project delivery to product ownership • Building agile squads that genuinely accelerate change • Embedding change capability within operations • Prioritisation models that balance regulation, BAU and innovation • Governance approaches that enable pace while maintaining control <p><i>With Solve Partners</i></p>
0850-0955	<p>BUILDING CYBER RESILIENCE IN A FAST-CHANGING INDUSTRY</p> <p>As digital adoption accelerates and cyber threats grow more sophisticated, firms must strengthen resilience not just for regulatory compliance, but to protect the client trust at the heart of wealth management.</p> <p>The session will provide a practical framework for modern cyber resilience and operational readiness by exploring how COOs can better understand their digital risk surface, prepare for high-velocity threats, and embed resilience into daily operations, including:</p> <ul style="list-style-type: none"> • The escalating pace and complexity of cyber threats • Identifying the most material areas of digital vulnerability • Embedding resilience into core operations and client processes • Strengthening human risk management and rapid-reporting behaviours • Balancing security with a seamless client experience <p><i>Expert TBC</i></p>
0955-1000	<p>THANK YOU AND WAVE GOODBYE – Key conclusions</p>

BreakfastBriefing

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

- **Argentis Financial Planning Ltd**, *Chief Technology & Transformation Officer*
- **Ascot Lloyd**, *Chief Technology & Operations Officer*
- **Bordier & Cie (UK) PLC**, *Chief Operating Officer*
- **Brown Advisory**, *Head of International Operations*
- **Brown Shipley & Co Limited**, *Chief Operating Officer*
- **C Hoare & Co**, *Chief Operating Officer*
- **Canaccord Wealth**, *Group Chief Operating Officer*
- **Cazenove Capital**, *Chief Operating Officer - UK Wealth Management*
- **Credit Information Governance Body**, *General Manager*
- **Eighteen48 Partners Limited**, *Chief Operating Officer*
- **HFMC Wealth Management Ltd**, *Executive Director*
- **Independent**, *Chief Operating Officer*
- **Independent**, *Chief Technology Officer*
- **Isio Wealth Planning**, *Chief Operating Officer*
- **James Hambro & Partners LLP**, *Chief Operating Officer*
- **Julius Baer International Ltd**, *Chief Operating Officer*
- **Killik & Co**, *Chief Operating Officer*
- **Lincoln Private Investment Office**, *Chief Operating Officer*
- **Perspective Financial Group Limited**, *Chief Operating Officer*
- **Rathbones Group Plc**, *Chief Operating Officer*
- **Rathbones Group Plc**, *Chief Operating Officer*
- **Rothschild & Co**, *Head of Investment Solutions and Client Support*
- **Saranac Partners Limited**, *Head of Operations & Onboarding*
- **Schroders Personal Wealth**, *Chief Operating Officer*
- **Stifel Europe Bank AG**, *Chief Operating Officer*
- **Succession Advisory Services**, *Chief Operating Officer*
- **WIM**, *Chief Operating Officer*

BreakfastBriefing

Experts & Organisers

- **Solve** - Dave Mason, *Managing Director*
- **Solve** - Donald Reid, *Founder*
- **Owen James Group** – James Goad, *Managing Director*
- **Owen James Group** – John Hall, *Senior Delegate Manager*
- **Owen James Group** – Rebecca Leitch, *Conference & Content Manager*