

BreakfastBriefing

COO Wealth Management & Private Banking Afternoon Briefing
INTELLIGENT INFRASTRUCTURE: USING DATA AND OPERATIONS TO UNLOCK ORGANIC GROWTH
 Wednesday 1st July 2026 (1600-1800) – Andaz Hotel, 40 Liverpool St, London EC2M 7QN

1600-1610	<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>
1610-1700	<p>DATA IN AN AI WORLD: TURNING COMPLEXITY INTO CLIENT INTELLIGENCE</p> <p>As firms accelerate digital transformation, data architectures are becoming increasingly complex. AI promises to enhance modelling, uncover hidden patterns and strengthen client insights, but success depends on how effectively organisations structure, govern and interpret their data ecosystems.</p> <p>This session will explore how firms can harness AI-enabled data capabilities to enhance client strategy, operational efficiency and decision-making, including:</p> <ul style="list-style-type: none"> • Building intelligent data models that reveal relationships between clients, products and behaviours • Using AI to detect patterns, improve segmentation and generate actionable insight • The role of ontology and structured data in improving model accuracy • Governance challenges when deploying AI-driven analytics • Turning data complexity into practical commercial advantage <p><i>Expert: TBC</i></p>
1700-1755	<p>STREAMLINING OPERATIONS FOR ORGANIC GROWTH: REDUCING FRICTION AT SCALE</p> <p>Operational friction remains one of the greatest barriers to scalable organic growth. Leading firms are simplifying processes, redesigning workflows and removing inefficiencies to unlock adviser capacity and improve client experience.</p> <p>This interactive, peer-led session will focus on practical use cases and shared operational lessons, exploring:</p> <ul style="list-style-type: none"> • Where operational bottlenecks most restrict growth and client service • Process redesign strategies that have delivered measurable efficiency gains • Leveraging automation and workflow tools to reduce manual intervention • Balancing simplification with regulatory and governance requirements • Practical examples of friction reduction from peer organisations <p><i>Experts: Eden Scrivener, Ascot Lloyd & Becky Robbins, Lincoln</i></p>
1755-1800	<p>THANK YOU - AND HOPE YOU CAN STAY FOR A DRINK</p>

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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

- **Argentis Financial Planning** – *Chief Technology & Transformation Officer*
- **Ascot Lloyd** – *Chief Technology & Operations Officer*
- **Attivo Group** – *Operations Director*
- **Benchmark Capital** – *Head of Business Operations*
- **Bordier & Cie (UK) PLC** – *Chief Operating Officer*
- **Brown Advisory** – *Head of International Operations*
- **C Hoare & Co** – *Chief Operating Officer*
- **Clifton Asset Management PLC** – *Head of Proposition*
- **Eighteen48 Partners Ltd** – *Chief Operating Officer*
- **Fairstone Group** – *Chief Operating Officer*
- **Handelsbanken** – *Head of Wealth Operations*
- **Hargreaves Lansdown** – *Chief Operating Officer*
- **Independent** – *Chief Technology Officer*
- **Independent** – *Chief Operating Officer*
- **James Hambro & Partners LLP** – *Chief Operating Officer*
- **JM Finn & Co** – *Chief Operating Officer*
- **Killik & Co** – *Chief Operating Officer*
- **Lincoln Private Investment Office** – *Chief Operating Officer*
- **Lombard Odier** – *Chief Operating Officer*
- **One Four Nine Group** – *Chief Operating Officer*
- **Premier Miton** - *Chief Operating Officer*
- **Quanta Group** – *Chief Operating Officer*
- **Rothschild & Co** – *Head of Investment Solutions & Client Support*
- **Sarasin & Partners LLP** – *Chief Operating Officer, Client Affairs*
- **Seven Investment Management** – *Chief Operating Officer*
- **Shackleton Advisers** – *Chief Operating Officer*

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- **Stifel Europe Bank AG** – *Chief Operating Officer*
- **Suntera Global** – *Global Chief Operating Officer*

Experts & Organisers

- **Solve** - Dave Mason, *Managing Director*
- **Solve** – Farzana Khalil, *Director*
- **Owen James Group** – James Goad, *Managing Director*
- **Owen James Group** – John Hall, *Senior Delegate Manager*
- **Owen James Group** – Rebecca Leitch, *Conference & Content Manager*
- **Owen James Group** – Georgia Edwards, *Event Coordinator*