

Wealth Management & Private Banking 'Heads of Wealth' Breakfast Briefing XLII

REDEFINING VALUE IN A MORE OPEN INVESTMENT MARKET

Thursday 29 January 2026 (0800-1000) at Octopus offices, 33 Holborn, London, EC1N 2HT

0800-0810	<p>WELCOME</p> <p>Our chair will provide his hotly anticipated and entertaining canter through some of the more light-hearted news items to have appeared since we last met.</p> <p><i>Chair: Paul Rose, Key Partnerships Manager at Octopus Investments</i></p>
0810-0855	<p>A NEW RETAIL INVESTMENT ENVIRONMENT: WHAT IT MEANS FOR WEALTH MANAGERS</p> <p>This session will outline the direction of travel in UK government and FCA policy, highlighting the key changes and how these intersect with shifting consumer behaviour.</p> <p>Grounded in two recent pieces of research on UK fund distribution trends, and consumer insight tracking sentiment and behaviour changes around saving and investing, we will ask:</p> <ul style="list-style-type: none"> • What this environment means for wealth managers, where opportunities may increasingly sit • How the balance between direct-to-consumer investing and advised solutions is evolving, and how firms can position themselves as clients' needs and assets grow <p><i>Expert: Annalise Toberman, Associate Research Director, Plaforum</i></p>
0855-0910	<p>NETWORKING</p> <p>An opportunity to recharge your coffee and meet some new or familiar faces</p>
0910-0955	<p>FEE COMPRESSION AND PRICING INNOVATION: REDEFINING VALUE IN WEALTH MANAGEMENT</p> <p>Fee pressure in wealth management is no longer driven solely by competition or regulation, but by deeper structural forces: changing client behaviour, greater transparency, the rise of scalable digital propositions, and an increasing separation between what clients pay for and what firms deliver.</p> <p>While outright fee compression remains uneven across segments, expectations around value, clarity and flexibility are rising across the board. This session will explore:</p> <ul style="list-style-type: none"> • How leading firms are responding, not simply by cutting prices, but by rethinking pricing architecture, charging mechanisms and the articulation of value • Where pricing models are breaking down, where innovation is emerging, and how firms can protect margins while aligning more closely with how clients engage, accumulate and decumulate wealth <p><i>Expert: Pauline Egan, Independent Consultant, Galindago Limited</i></p>
0955-1000	<p>THANK YOU, NEXT STEPS AND OFF TO WORK WE GO!</p>

THE ROLE OF THESE BRIEFINGS?

Following on the success of a series of strategic breakfast briefings for CEOs, COOs, CFOs, CIOs and HR Directors from the largest private banks and wealth managers, Owen James, in association with Octopus Investments, recognised that there was an interest in creating a similar platform which brings together Heads of Wealth/Financial Planning for regular updates on the issues which affect their day to day.

These briefings, now into their sixth year, explore topics such as regulation, the client journey/interface, the impact of new technology and tax issues - all in the quest to provide the best possible customer outcomes.

WEALTH MANAGERS & PRIVATE BANKS

- **Argentis Financial Planning Ltd**, Head of Financial Advice
- **Attivo Group**, Head of Proposition
- **Bordier & Cie (UK) PLC**, Head of Wealth Planning
- **Evelyn Partners**, Managing Director, Financial Planning
- **HBL Bank UK**, Executive Head of Wealth Services
- **Hybrid Advice**, Chief Executive Officer
- **JM Finn & Co Ltd**, Head of Wealth Planning
- **Killik & Co**, Partner, Chartered Wealth Planner
- **Killik & Co**, Partner & Head of Wealth Planning
- **MASECO Private Wealth**, Head of Advanced Planning
- **Nedbank Private Wealth**, Senior Wealth Planner
- **Quilter plc**, Quality Advice Manager
- **Rathbones Group Plc**, Divisional Lead
- **Rathbones Group Plc**, Head of Advice – Rathbones Private Office
- **Raymond James Investment Services Ltd**, Managing Director of Wealth Management Services
- **Shackleton Advisers**, Chief Executive Officer
- **St. James's Place Wealth Management Group**, Senior Advice Policy Lead
- **Stonehage Fleming Group**, Partner - Head of Wealth Planning
- **UBS Wealth Management UK**, Head of High Net Worth UK
- **Unio Wealth Management**, Chief Executive Officer

SPEAKERS AND ORGANISERS

- **Octopus Investments** - Paul Rose, *Key Partnerships Manager*
- **Platforum** - Annalise Toberman, *Associate Research Director*
- **Galindago Limited** - Pauline Egan, *Independent Consultant*
- **Owen James Group** - James Goad, *Managing Director*
- **Owen James Events** - Mark Davison, *Delegate Manager*
- **Owen James Events** - Rebecca Leitch, *Content & Conference Manager*