

WEALTH MANAGEMENT & PRIVATE BANKING 'HEADS OF WEALTH' BREAKFAST BRIEFING XLIII

Thursday 13 May 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: Olly Jacobs, Key Partnerships Manager at Octopus Investments</i></p>
0810-0855	<p>FINDING THE NEXT CLIENT: BEHAVIOUR, TRUST AND THE CHANGING ROUTES TO GROWTH</p> <p>Behavioural insight and AI are reshaping how people discover, evaluate and choose financial support. This session will explore how advisory firms can better understand modern client behaviour and adapt their growth strategies accordingly, including:</p> <ul style="list-style-type: none"> • How client discovery journeys are changing and where new clients are now coming from • The behavioural barriers that prevent people from seeking - and committing to - advice • How trust is formed when prospective clients arrive already informed by peers and AI models • What value advisory firms actually deliver in a world where information is free and advice is partly automated <p><i>Expert: Dr Philip Courtenay, Founder, Humans & Money</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>OPENING THE PRIVATE MARKETS DOOR: THE NEXT PHASE OF ALTERNATIVE INVESTMENTS IN WEALTH</p> <p>Driven by regulatory change, product innovation and growing client demand, advisers are increasingly being asked to consider allocations beyond traditional public markets. This session will examine how private markets are becoming more accessible to wealth clients, and what this means for advisers and portfolio construction, including:</p> <ul style="list-style-type: none"> • How access to private markets and alternatives is evolving across the wealth sector • The structures and platforms enabling wider participation in private assets • The opportunities and risks of incorporating alternatives into client portfolios • Governance, liquidity and suitability considerations for advisers • How private markets may reshape portfolio construction and client expectations over the coming decade <p><i>Expert: Roopalee Dave, UK Head of Wealth Management and Partner at EY, Wealth and Asset Management</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

- **7IM Investment and Retirement Solutions Limited**, Managing Director, Corporate & Strategy Development
- **Argentis Financial Planning Ltd**, Head of Financial Advice
- **Atomos**, Managing Director, Financial Planning
- **Attivo Group**, Head of Proposition
- **Barclays Wealth & Investment Management UK**, Wealth Planning Head of Distribution
- **Bordier & Cie (UK) PLC**, Head of Wealth Planning
- **Canaccord Wealth**, Head of Wealth Planning
- **Charles Stanley & Co Ltd**, Director, Financial Planning
- **City Asset Management Plc**, Director, Head of Financial Planning
- **EQ Investors Limited**, Joint CEO & Head of Financial Planning
- **Evelyn Partners**, Chief Financial Planning Director
- **Evelyn Partners**, Head of Financial Planning Advice
- **Goldman Sachs**, Vice President / Executive Director - Strategic Wealth Planner - Private Wealth Management
- **HBL Bank UK**, Executive Head of Wealth Services
- **Hybrid Advice**, Chief Executive Officer
- **JM Finn & Co Ltd**, Head of Wealth Planning
- **Julius Baer International Ltd**, Director, Wealth Planner
- **Killik & Co**, Partner, Chartered Wealth Planner
- **MASECO Private Wealth**, Partner, Head of Advanced Planning
- **Nedbank Private Wealth**, Executive Head of Wealth Management
- **Nedbank Private Wealth**, Senior Wealth Planner
- **One Four Nine Group**, Chief Executive Officer
- **Quilter plc**, Quality Advice Manager
- **Rathbones Group Plc**, Managing Director - Rathbones Financial Planning
- **Rathbones Group Plc**, Head of Advice – Rathbones Private Office
- **Shackleton Advisers**, Chief Executive Officer
- **St. James's Place Wealth Management Group**, Senior Advice Policy Lead
- **TrinityBridge**, Managing Director

SPEAKERS AND ORGANISERS

- **Octopus Investments** - Paul Rose, *Key Partnerships Manager*
- **Humans & Money** - Dr Philip Courtenay, *Founder*
- **EY Wealth and Asset Management** - Roopalee Dave, *UK Head of Wealth Management and Partner*
- **Owen James Group** - James Goad, *Managing Director*
- **Owen James Events** - Mark Davison, *Delegate Manager*
- **Owen James Events** - Rebecca Leitch, *Content & Conference Manager*