

WORKFORCE STRATEGY IN A CHANGING REGULATORY AND CULTURAL LANDSCAPE

HR Directors Private Banking, Wealth and Asset Management Breakfast Briefing XXXII

Thursday 2 July, 2026 (0830-1000) at Farrer & Co, 66 Lincoln's Inn Fields, London WC2A 3LH

0830-0835	WELCOME Outline the objectives of the HR Briefing Series <i>Chair: James Goad, Managing Director, Owen James</i>
0835-0915	A FOCUSED LOOK AT THE UNFAIR DISMISSAL CHANGES UNDER THE EMPLOYMENT RIGHTS ACT 2025 • A recap on the changes and the related implications; • Getting ready for 1 January 2027; • Areas to prioritise; • Pre-January 2027 checklists; • Recruitment, onboarding and probation periods; • Avoiding accidental eligibility; and • Post January 2027 considerations and the new compensation landscape. <i>With David Hunt, Partner at Farrer & Co</i>
0915-0955	THE BUSINESS CASE FOR INCLUSION - FROM CULTURE TO PERFORMANCE Inclusion, wellbeing and belonging are increasingly recognised as critical drivers of retention, productivity and organisational resilience - yet many HR leaders still face challenges translating this into a compelling business case for CEOs and boards. This session will explore how embedding an inclusive workplace culture delivers measurable business outcomes, drawing on data from the <i>State of Inclusion Report</i> and the Inclusion Benchmark, by focusing on: • What the data shows about the link between inclusion, productivity, staff retention and talent attraction • Why inclusion is shifting from a “nice to have” to a core leadership capability • How organisations performing well on inclusion strategy also achieve stronger wellbeing and belonging outcomes • What leading financial services firms are doing on the ground - policies, behaviours and leadership practices that drive results • How HR Directors can use data, benchmarks and case studies to articulate the ROI of inclusion and re-engage CEOs <i>With Sandi Wassmer, CEO and Gemma Wood, Head of Marketing, PR and Communications at Onvero</i>
0955-1000	WRAP UP, THANK YOU AND NEXT STEPS

WHAT IS THE CONTEXT OF THE BREAKFAST BRIEFING?

Working with Owen James, Farrer & Co continue to provide a platform for bringing together HR Directors from within wealth management, private banking and asset management for regular updates and discussions on all aspects of this complex and demanding role.

PARTICIPANT LIST

Brooks Macdonald Group, *Head of HR Business Partnering*

Brooks Macdonald Group, *HR Business Partner*

Edmond de Rothschild, *Head of Human Resources*

Handelsbanken plc, *Acting Head of HR*

HBL Bank UK, *HR Talent & Business Partner Head*

Investec Bank (UK) Ltd, *Head of People and Organisation*

James Hambro & Partners LLP, *Head of HR*

JM Finn & Co Ltd, *Head of Human Resources*

LGT Wealth Management, *Head of Human Resources*

MASECO Private Wealth, *Head of Human Resources*

QNB Group, *HR Manager*

Sarasin & Partners LLP, *Head of Human Resources*

SPEAKERS & ORGANISERS

Farrer & Co – David Hunt, *Partner*

Onvero – Sandi Wassmer, *Chief Executive Officer*

Onvero – Gemma Wood, *Head of Marketing, PR and Communications*

Owen James Group – James Goad, *Managing Director*

Owen James Group – Mark Davison, *Relationship Manager*

Owen James Events - Rebecca Leitch, *Content & Conference Manager*