

DinnerBriefing

Private IFA dinner hosted by Raymond James & Owen James

THE LONG GAME: WHY PARTNERSHIP IS THE NEW SOURCE OF DIFFERENTIATION

Tuesday 6 October 2026, The Caledonian, Princes Street, Edinburgh, EH1 2AB

18:30-19:00	WELCOME DRINKS
19:00-19:05	WELCOME An outline of the objectives of the IFA Dinner Series <i>Raymond James to Chair</i>
19:05-19:40 (Starter)	ACCOUNTABILITY REMAINS. How has outsourcing changed the adviser's role? The whitepaper's 'Great Separation' shows how financial planning and investment management have become distinct disciplines. Yet outsourcing investment decisions does not transfer responsibility for client outcomes. This session will explore: • Why advisers increasingly distinguish financial planning from investment management • What the finding that 81% retain accountability for investment governance means in practice • How oversight, suitability, provider due diligence and client communication remain with the advice firm • Why governance evolves rather than disappears - and what advisers need from providers to fulfil their responsibilities <i>Expert: To be announced</i>
19:40-20:20 (Main)	INVESTMENT CAPABILITY IS THE STARTING POINT. What reveals a genuine partnership? The whitepaper finds that strong investment management remains essential, but is increasingly viewed as a minimum standard. With propositions harder to distinguish, advisers look to the experience of working with a provider - particularly when markets become difficult. This session will explore: • Why more than 40% of advisers see MPS providers as interchangeable once portfolios are in place • How governance support, access to investment expertise and proactive communication create value beyond portfolios • Why 62% say differences between providers are most visible during volatile markets • How responsiveness and clear explanations help advisers support clients and maintain confidence under pressure <i>Expert: To be announced</i>
20:20-21:00 (Dessert)	SATISFACTION DOES NOT GUARANTEE LOYALTY. What makes a partnership worth keeping? The whitepaper reveals a broadly satisfied but competitive market. Long-term relationships depend on more than investment capability: provider behaviour, accessibility and practical support influence whether advisers stay. This session will explore:

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	• Why 90% satisfaction coexists with 58% considering a provider review within 12 months • How responsiveness, communication and access to decision-makers shape adviser confidence alongside investment performance • What advisers value most from a provider - including dedicated relationships, governance support and strategic input • What a differentiated, long-term investment partnership should deliver for advisers and their clients <i>Expert: To be announced</i>
21:00-21:30	THANK YOU FOLLOWED BY NETWORKING DRINKS – Key conclusions

What is the context of these private Dinners?

Raymond James Wealth Management and Owen James are bringing together a small group of independent financial planning firms to discuss how the relationship between advisers and their outsourced investment partners is changing.

This evening draws on *The Long Game: Why Partnership Is the New Source of Differentiation*, research commissioned by Raymond James and independently conducted by Owen James. The whitepaper's methodology describes 25 in-depth qualitative interviews and a supporting quantitative survey of 50 adviser firms. It explores the separation of financial planning and investment management, the accountability and governance that remain after outsourcing, and how provider behaviour and partnership shape confidence and loyalty.

The objective is not simply to present the findings, but to test them against the room's own experience. Three discussions follow the whitepaper's central themes: accountability and governance; differentiation and the test of volatility; and the behaviours and support that sustain long-term partnerships. The aim is to leave with a clearer view of what advisers need from their outsourced investment partners.

Participant List

- **Aqua Wealth Management Limited** – *Independent Financial Adviser*
- **Blackstone Moregate Ltd** – *Chief Executive Officer*
- **Clifton Asset Management PLC** – *Managing Director*
- **David James Wealth Limited** – *Managing Director*
- **Deep Dive Financial Planning** – *Director*
- **Federico Nicholas Wealth Management Limited** – *Independent Financial Adviser*
- **Fiducia Wealth Management Limited** – *Managing Director*
- **GPFM Financial Planners** – *Managing Director*
- **GPFM Financial Planners** – *Managing Director*
- **Henderson Moore Financial Solutions Ltd** – *Partner*
- **Holyoakes Group Ltd** – *Director of Financial Planning*
- **Lisa Nugent Financial Planning Limited** – *Independent Financial Adviser*
- **M & M Financial Services Ltd** – *Co-Managing Director*
- **Oakfield Financial Services Limited** – *Managing Director*

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- **Origen Financial Services** – *Director*
- **Pi Financial Ltd** – *Managing Director*
- **Solidus IEP** – *Managing Director*
- **Warden Consulting** – *Founder*
- **Wardour Financial Planners Ltd** – *Director*

Experts & Organisers

- **Raymond James** - TBC, TBC
- **Raymond James** - TBC, TBC
- **Raymond James** - TBC, TBC
- **Raymond James** - TBC, TBC
- **Owen James Group** - TBC - TBC