

SCALING WITHOUT BREAKING: DRIVING ORGANIC GROWTH WHILE BUILDING A RESILIENT WEALTH BUSINESS

Wednesday 22 April 2026 (0800-1000) at the SEI, Alphabeta Building, 14-18 Finsbury Square, London, EC2A 1BR

This briefing brings senior leaders together to explore how scalable investment propositions, sharper growth ownership and more efficient platforms, processes and teams can unlock operating leverage without increasing risk. Drawing on practical UK experience and lessons from the more mature US market, the two sessions below will focus on the strategic and operational shifts required to turn growth ambition into measurable outcomes:

0800-0820	<p>WELCOME AND SCENE SETTING</p>
0820-0900	<p>ORGANIC GROWTH: FROM STRATEGIC PRIORITY TO MEASURABLE PERFORMANCE</p> <p>Organic growth has moved to the top of leadership agendas as firms face margin pressure, slower markets and greater scrutiny on capital efficiency. Yet many businesses still struggle to identify where growth is truly generated - and who is accountable for delivering it.</p> <ul style="list-style-type: none"> • Why organic growth has become a board-level priority in today's market environment • How firms can gain clear visibility of asset and revenue growth across the client lifecycle • Where responsibility for growth truly sits across advisers, distribution teams and leadership • How to align incentives, reporting and decision-making with growth objectives • What leading firms do differently to turn growth ambition into measurable performance <p><i>Experts: Alex Marshall, Partner and James Leonard, Director (Financial Services) at CIL Consultants</i></p>
0900-0945	<p>SCALING GROWTH: PRODUCTIVITY, PROPOSITIONS AND OPERATING LEVERAGE</p> <p>Sustainable growth depends not just on winning new business, but on the ability to scale efficiently. Centralised investment propositions (CIPs), integrated operating models and process efficiency are increasingly critical to delivering growth without adding cost or complexity.</p> <ul style="list-style-type: none"> • The role of CIPs in enabling consistent, scalable growth • Removing friction across platforms, teams and processes to unlock capacity for growth • How firms can improve productivity without increasing operational risk • Lessons from US wealth managers on scalable growth models, alternatives adoption and differentiated propositions <p><i>Expert: Ian Love, Head of Asset Management at SEI</i></p>
0945-0950	<p>SUMMARY & NEXT STEPS</p>

About SEI®

SEI (NASDAQ:SEIC) is a leading global provider of financial technology, operations and asset management services within the financial services industry. SEI tailors its solutions and services to help clients more effectively deploy their capital whether that's money, time, or talent so they can better serve their clients and achieve their growth objectives.

Participant List

- **Advanta Wealth** – *Managing Director*
- **Beckett Investment Management** – *Chairman*
- **Fairstone Financial Management** – *Chief Executive Officer*
- **Fairstone Financial Management** – *Chief Operations Officer*
- **HBL Bank UK** – *Executive Head of Wealth Services*
- **HFMC Wealth** – *Executive Director*
- **In Partnership Financial Advisers Ltd** – *Chief Executive Officer*
- **Isio Wealth Planning** – *Consultant*
- **James Hambro & Partners** – *Chief Operating Officer*
- **Killik & Co** – *Chief Operating Officer*
- **Oberon Investments Ltd** – *Head of Investment Management*
- **One Four Nine Group** – *Chief Executive Officer*
- **Parmenion Capital Partners** – *Chief Commercial Officer*
- **Raymond James** – *Group Chief Financial Officer*
- **Saltus Partners** – *Daniel Underwood, Chief Financial Officer*
- **Shackleton Advisers** – *Regional Director (North) & Head of Business Delivery*
- **Succession Wealth** – *Chief Operating Officer*
- **Tavistock Investments PLC** – *Corporate Development Director*
- **Tideway Wealth** – *Chief Executive Officer*
- **True Potential Wealth Management** – *Chief Executive Officer*
- **True Potential Wealth Management** – *Chief Client Officer*
- **WIM** – *Chief Commercial Officer*
- **Willis Owen – part of Moneyfarm** – *Chief Commercial Officer & CEO Willis Owen*

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