

Unbiased Breakfast Briefing

The organic growth divide: Is company culture your biggest obstacle to growth?

Thursday 9th July, (0800-1000), Pan Pacific, 80 Houndsditch, London, EC3A 7AB

OVERVIEW:

In an era of hypercompetition, while the mandate for organic growth has never been stronger, it's also never been so complex. For many of the UK's leading advisory firms, the biggest challenge isn't the market; it's the internal cultural divide, while leadership teams are under pressure to deliver scalable, predictable growth, many firms remain constrained by cultural misalignment, inconsistent adviser engagement and operating models built more for servicing than acquisition.

This Breakfast Briefing will explore the divide at the heart of the modern advisory firm: the tension between the strategic need for growth and the individual desire for stability - and what it takes to align the business around a scalable, modern client acquisition model.

0800-0815	WELCOME & INTRODUCTION
0815-0845	THE ECONOMICS OF ORGANIC GROWTH IN A HYPERCOMPETITIVE MARKET The economics of growth are changing rapidly. Rising acquisition costs, increasing competition and AI is driving disruption. Together, these factors are reshaping how advisory businesses attract and retain clients. This session will explore: • How competition and rising acquisition costs are changing the organic growth equation • Whether AI and automation are becoming genuine growth enablers - or simply efficiency tools • What the industry can learn from the firms successfully scaling organic growth
0845-0915	THE STRATEGIC DIVIDE - WHY FIRMS STRUGGLE TO ALIGN AROUND GROWTH Leadership teams increasingly view organic growth as a strategic necessity, yet advisers and distribution teams often operate with different incentives, priorities and definitions of success. This creates a cultural divide that can quietly undermine growth ambitions. This session will explore: • Why leadership and advisers often have conflicting views on what "good growth" looks like • The differing cultural challenges facing PE-backed, PE-aspirant and independently owned firms • Whether firms are structurally set up to acquire clients - or simply retain them
0915-0945	BUILDING A SCALABLE GROWTH CULTURE Firms that successfully deliver organic growth are increasingly combining culture, operating model design and data-led decision-making to create more scalable acquisition strategies. This session will explore: • How to build an operating model that supports firm-wide growth • How firms can use behavioural and performance insight to identify adviser growth potential • What scalable, modern client acquisition models look like in practice
0945-1000	CLOSING REMARKS & NETWORKING

PARTICIPANT LIST:

- **Argentis Financial Planning** – *Head of Financial Advice*
- **Attivo Group** – *Operations Director*
- **Barclays Wealth & Investment Management** - *Managing Director & Global Head of Sales*
- **Beckett Investment Management** – *Chairman*
- **Charles Stanley & Co** – *Director of Financial Planning Proposition*
- **Clifton Asset Management PLC** – *Managing Director*
- **Fairstone Group** – *Chief Executive Officer*
- **Fidelius** – *Chief Executive Officer*
- **JM Finn & Co Ltd** – *Member of the Management Committee*
- **JM Finn & Co Ltd** – *Head of Business Management*
- **(VIRTUAL) Pi Financial** - *Chairman*
- **Purposeful Group** – *Chief Client Officer*
- **Quanta Group** – *Managing Director, Craven Street Wealth*
- **Rathbones Group** – *Head of Financial Planning*
- **Rathbones Group** – *Divisional Lead*
- **Raymond James** – *Managing Director of Wealth Management Services*
- **Shackleton Advisers** – *Chief Executive Officer*
- **Shackleton Advisers** – *Regional Director (North) & Head of Business Delivery*
- **Soderberg & Partners** – *CEO of Soderberg & Partners Asset Management*
- **Timothy James & Partners** – *Director*
- **True Potential Wealth Management** – *Chief Executive Officer*
- **WIM** – *Chief Commercial Officer*
- **WIM** – *Chief Marketing Officer*
- **(VIRTUAL) Wren Sterling** – *Marketing Director*

EXPERTS & ORGANISERS:

- **Unbiased** – *Managing Director*
- **Owen James** – *Managing Director*