

Delegate  
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# Festival of Finance

**THE MUST-ATTEND, FLAGSHIP  
EVENT FOR FINANCIAL ADVICE  
AND WEALTH MANAGEMENT  
WHERE INSIGHTS MEET INFLUENCE**

**Tuesday 29 September 2026**  
Birmingham Repertory Theatre  
6 Centenary Square, Birmingham B1 2EP

Powered by  **owenjames**

# INSIGHT. INNOVATION. CONNECTION.

**T**he Festival of Finance marks the launch of a bold, new flagship event for the UK financial advice and wealth management profession.

Designed for principals, partners, directors and senior executives, it delivers practical commercial insight, peer benchmarking, regulatory interpretation and high-quality connections you can take straight back to the business.

## ***This is not just another conference.***

Too many events focus on what has already happened. The Festival is built to help you anticipate what's coming next, and to compare how leading firms are adapting their growth models, propositions and operating choices in real time.

From over a decade of convening senior leaders through A Meeting of Minds, we know what makes a day out of the business genuinely worthwhile:

- Insight into priorities and direction for the next 12-24 months (including key areas of regulatory focus), not a rehash of published guidance.
- Direct commentary on active themes shaping the market, from retirement income and consolidation to advice models and efficiency.
- Clarity on where thinking is still evolving or unresolved, and what 'good' looks like in practice.
- Peer-led, experience-based learning: what firms are changing, testing and improving, not what vendors are selling.



*In our industry, there are many events to choose from, but only a few are genuinely worth a full day out of the business. This is one of them. The Festival of Finance blends Q&A-led sessions, interviews and curated discussions. Less lecture, more conversation so you leave with practical insight you can act on.*

**James Goad, Managing Director of Owen James Events**



# WHO WILL BE THERE?

## The full UK advice and wealth management ecosystem

Join **senior advisers, wealth managers and industry leaders** - with representation spanning independent firms, national and regional practices, consolidators, platforms, product providers, technology partners and regulators.



### Attendees will include:

- ▶ **Independent Financial Advisers (IFAs)**  
Firm owners, principals and senior advisers
- ▶ **Wealth Managers & Investment Professionals**  
From boutique firms to larger discretionary and hybrid models
- ▶ **Advice & Wealth Firm Leadership**  
CEOs, COOs, Heads of Advice, Investment, Operations, Compliance and Growth
- ▶ **Platforms, Providers & Product Specialists**  
Investment, retirement, protection, platform and proposition leaders
- ▶ **Technology & Innovation Partners**  
Advice tech, AI, data, CX and digital enablement specialists
- ▶ **Regulatory & Industry Voices**  
Contributing insight, perspective and market context
- ▶ **Future Leaders & Rising Talent**  
Connecting today's decision-makers with tomorrow's leaders



# WHAT TO EXPECT?

Your festival experience is organised across distinct zones, each featuring clearly signposted sessions that you can choose from to craft a personalised itinerary.

Additionally, there will be dedicated spaces tailored to varying levels of seniority—including an exclusive Leaders' Lounge—designed to facilitate intimate discussions and peer benchmarking.

## 01

### MAIN STAGE

**The headline platform for insight, influence and visibility.**

The Main Stage brings the full audience together for the Festival's keynote sessions. This is where you will hear the market outlook, explore regulatory direction and engage with the ideas shaping the future of financial advice and wealth management.

## 02

### THE ACADEMY

**A workshop hub for practical learning and interactive discussion.**

Running throughout the day, The Academy hosts CPD-accredited workshops in a focused space for deeper discussion, audience participation and moderated Q&A. It gives you the opportunity to engage directly with key topics, ask questions and turn insight into practical action.

## 03

### INNOVATION ZONE

**The product demo space for hands-on discovery and live engagement.**

Centred around live demonstrations and interactive showcases, the Innovation Zone allows you to explore products in action and see how solutions work in practice. It provides a natural setting for solution-led conversations as you assess new tools, platforms and services.

## 04

### WELLNESS HUB

**A space for wellbeing, coaching and reset.**

Offering a place for respite during the day, the Wellness Hub gives you time to pause and recharge through breathing techniques and other wellbeing focused sessions, helping you reset, refocus and return with renewed energy and clarity.

## 05

### WEALTH WAY

**The social and commercial heart of the festival.**

A vibrant high-energy walkway that brings delegates, sponsors and partners together for exhibition, networking and meetings. It offers a lively environment where conversations flow, ideas are exchanged and valuable new connections are made.

## 06

### STRATEGY STUDIO

**A dedicated space for roundtable discussion and strategic calibration.**

Hosts curated roundtables shaped around the Festival's core pillars, creating a smaller and more focused environment for peer exchange. It gives you the opportunity to test assumptions, share perspective and take away practical thinking you can use in your business.

## 07

### LEADERS' LOUNGE

**A private lounge for senior meetings, peer benchmarking and one-to-one conversations.**

A relaxed space ideal for focused meetings, benchmarking discussions and quality time with peers and partners.

## 08

### NETWORKING NOOK

**A matchmaking area for peer introductions and networking.**

Built around data-led matchmaking, Networking Nook gives you a more purposeful way to connect. It supports intelligent introductions and better-matched conversations based on shared priorities, business needs and strategic relevance.

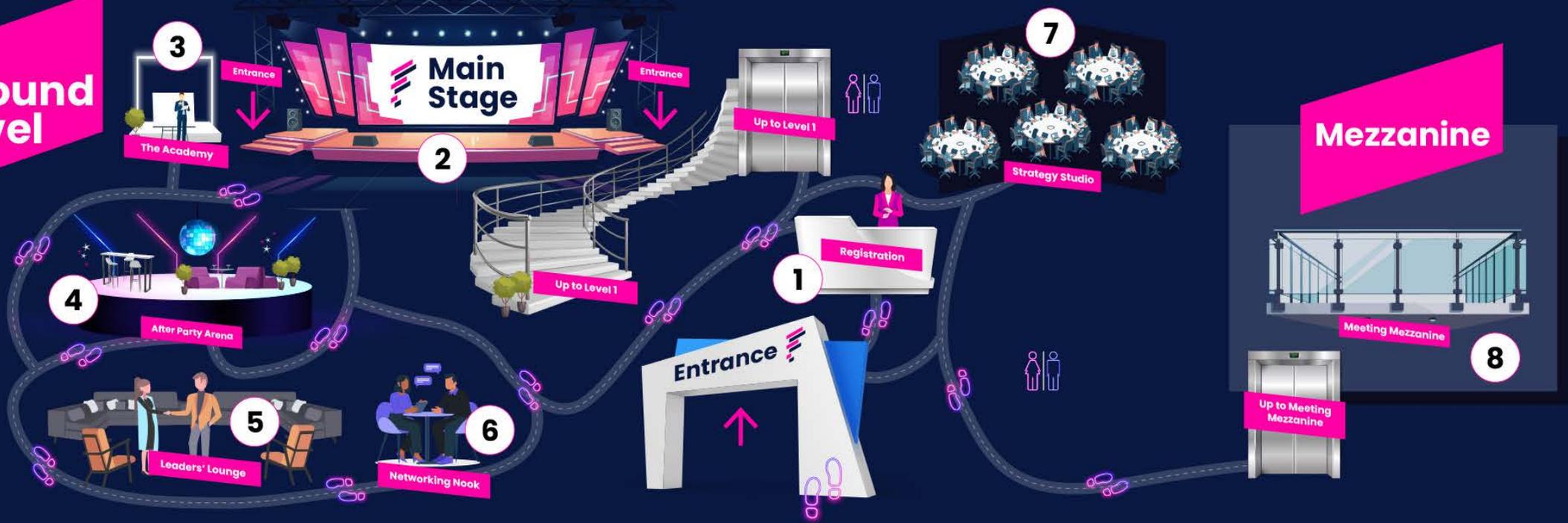
## 09

### MEETING MEZZANINE

**A space for speed networking, quick peer introductions and conversations.**

A structured speed networking format powered by data-led matchmaking, helping you meet more of the right people in less time. It keeps momentum high, turns introductions into real conversations and creates clear follow-up opportunities.

# Ground Level



# Level 1



# Event Map

Festival of Finance

<p><b>1</b></p> <p><b>Registration</b> Check in here to pick up your lanyard and receive event guidance.</p>	<p><b>2</b></p> <p><b>Main Stage</b> Hear from inspiring Keynote Speakers who will explore macro-economic outlooks, regulatory direction and the forces shaping the future of finance.</p>	<p><b>3</b></p> <p><b>The Academy</b> A workshop hub for practical learning and interactive discussion</p>	<p><b>4</b></p> <p><b>After Party Zone</b> An evening of entertainment and a celebratory reception, beginning at the close of the day and continuing into the night</p>	<p><b>5</b></p> <p><b>Leaders' Lounge</b> A private lounge for senior meetings, peer benchmarking and one-to-one conversations.</p>	<p><b>6</b></p> <p><b>Networking Nook</b> A matchmaking area for peer introductions and networking.</p>
<p><b>7</b></p> <p><b>Strategy Studio</b> A dedicated space for roundtable discussions and strategic calibration.</p>	<p><b>8</b></p> <p><b>Meeting Mezzanine</b> A space for speed networking, quick peer introductions and conversations.</p>	<p><b>9</b></p> <p><b>Refreshments &amp; Chill Out Zone</b> Take a moment to relax, gather your thoughts and re-set.</p>	<p><b>10</b></p> <p><b>Wellness Hub</b> A dedicated space for wellbeing, coaching and personal growth</p>	<p><b>11</b></p> <p><b>Innovation Zone</b> A fintech playground showcasing the latest tools, platforms and technologies.</p>	<p><b>12</b></p> <p><b>Wealth Way</b> A vibrant high-energy walkway that brings sponsors, delegates and partners together for exhibition, networking and meetings.</p>



# WHY ATTEND THE FESTIVAL OF FINANCE?

**The Festival combines high-quality insight, peer benchmarking and a curated audience into one flagship event, giving delegates unrivalled access to data, market intelligence and the people shaping the future of the industry.**

## **On the day you can expect:**

- Curated roundtables and workshops with peers of similar seniority and firm size
- Facilitated peer discussions anchored to a defined commercial or regulatory question
- Closed sessions and Chatham House-style formats to validate, benchmark or pressure-test strategic decisions
- Practical, commercially relevant insight with case studies from firms facing the same challenges
- Regulatory interpretation focused on what good looks like in practice, not a restatement of guidance
- Interactive formats including Q&A-led sessions, interviews and well-chaired discussions
- Data-led and structured networking

**CPD accredited.**

# WHAT SETS THE FESTIVAL OF FINANCE APART?

## 01 Unrivalled insight

The Festival of Finance combines Owen James Events' deep market understanding with data supported by the Fintel Group to surface emerging trends, from adviser behaviour and product usage to market sentiment.

This insight is embedded throughout the Festival via:

- Main Stage keynotes, roundtable discussions and workshops
- Data-led content and benchmarking
- Live polling and on-site insight capture
- Post-event intelligence and reporting

**Evidence-led insight, not just opinion-led commentary**

**For delegates, this means:**

- Clearer signals on market direction and what matters next
- Better understanding of peer priorities and emerging themes
- Practical insight you can apply to strategy, propositions and day-to-day decisions

## 02 Data-led networking

The Festival turns networking into a more intelligent and targeted experience, matching you with the most relevant peers based on seniority level, firm profile, priorities and needs.

**Fewer introductions. Better outcomes.**

## 03 Curated experience for senior leaders

Tiered experiences with protected small group discussions and executive lounges in closed formats, clearly signposted designed specifically for leadership-level decision-makers.

## 04 Interactive formats that respect your time

Less lecture and more conversation. Q&A led sessions, interviews, facilitated workshops, panels, live polling and Chatham House style roundtables.

## 05 Content designed for decision-makers

A forward-looking agenda focused on business growth, operating model choices, regulation and risk with peer benchmarking and case studies that help you validate strategy.

## 06 Backed by the industry's convener, a trusted partner

Led by Owen James Events and supported by the Fintel Group, the Festival benefits from trusted reach, market credibility and deep sector connection, with c.80% market penetration across the advice and wealth ecosystem.

Owen James Events has been a trusted partner in the industry, bringing together key influencers through flagship events such as Meetings of the Minds and delivering standout experiences for over two decades.

# REGISTER YOUR INTEREST

Get in touch today to secure your place. Be the first to receive the published programme, speaker announcements and senior forum details.



**Clare Frost**

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Tickets cost **£95+VAT**  
Register [here](#) today.



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