

SCOTLAND

a meeting of

MINDS



We invite you to participate IN SCOTLAND MEETING OF MINDS

Since 2005, Owen James has run over 150 Meeting of Minds events for the top advisory and wealth management firms in the UK.

These events typically have always been run in and around London or in Harrogate. While we have previously had events in Manchester, Leeds and Birmingham, there have been a number of calls to take the Meeting of Minds franchise north of the border particularly post - COVID.

Owen James in collaboration with Threesixty are keen to launch a Scottish version of A Meeting of Minds at the DoubleTree by Hilton, Perth Rd, Dunblane FK15 0HG.



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We understand your time pressures, so our offering is geared to ensuring that the day we ask you to spend with us, delivers substantial rewards.

You **SHOULD ATTEND** if...

- You are at the top level of your organisation
- Your 'in-tray' is piled high as you grapple with; economic uncertainty, changing demographics, environmental pressures, identifying new product lines, fast evolving technology, finding and retaining the right people and increasing productivity etc.
- Keeping up with both the big picture and the day-to-day elements of running a business is a difficult balancing act



there's a lot TO DISCUSS



- How do you price products when you are unsure as to what new economic cataclysm lies around the corner?
- Your end customers are struggling with affordability
- The actual number of properties on the market is slowing as everyone holds their breath
- The whole process of trading houses is so slow it is acting as a brake on economic activity
- The number of houses being built appears insufficient to keep pace with the increase in population. The infrastructure is creaking
- Keeping up with new and changing regulations
- Post pandemic, people's working practices have changed, impacting how and where they want to live
- There is the drive for Net Zero and the pressure to adhere to Government energy efficiency demands
- And the new proptech kids are biting at your heels!

We have produced THE DRAFT AGENDA documenting the issues we believe you will want to discuss. It is an evolving document and will no doubt introduce new subjects as we approach the Meeting. Your input will be sought and appreciated.

imagine a day WHERE YOU...

one

Spend a day in the company of some 60 carefully researched and personally invited members of your peer group.

A group of the top CEOs and Managing Directors from the leading financial advice and wealth management firms (ie DA firms with >3 advisers/RMs and AUM > £50m).

two

Discuss the strategic issues affecting your industry both at a macro level and a more granular level in small pre-researched roundtable sessions in board rooms, observing Chatham House rules. Led by experts and carefully facilitated to ensure everyone has their say

three

Hear inspirational and informative keynotes. Hear from disruptive technology innovators. Their role to provoke new thinking

four

Understand the key data points within the industry in terms of sentiment and financials and, where relevant, how they compare with other FS sectors

five

Enjoy **plenty of networking** and a very civilised lunch with a seating plan to ensure that you next to **like-minded people**

six

Access to a **bespoke app** which offers you the opportunity to **message your peer group**. The reality is that these Meetings are quite intimate gatherings and it is therefore quite easy to catch up with people. The organisers are on hand to support should you need some help

seven

Orchestrate your **personalised itinerary** built ahead of the day around your thought-through choices

eight

Do not have to pay to attend!



How is A Meeting of Minds funded?

WHAT IS THE QUID PRO QUO?

The Meeting will be funded by nine sponsor firms from product and service providers. This is a balance of Platforms, Tech firms; Asset Managers; Retirement & BR providers; Law firms; and Management Consultants – all represented at director level.

Their motivation for supporting Scotland Meeting of Minds is to understand your key issues so that they can be ready to respond to them.

They will be keen to network with you. You can, however, rest assured that this is NOT a sales environment. It is a platform for dialogue and understanding, and the sponsor firms understand that.



THE RESEARCH

We do ask you to complete a piece of online research – The Scene Setter. This is not an onerous undertaking we just seek broad brush profiling data on your individual companies, as well as, your thoughts on the issues affecting the industry as a whole. All of which is treated confidentially and analysed anonymously.

This enables us to play back to you the key headlines of the industry at a moment in time. As we run these Meetings biannually, we are able to benchmark.

who are OWEN JAMES?

Owen James has been organising strategic events for the financial services industry for approaching 20 years.

We have weathered the odd financial crisis and pandemic! And we feel fairly confident we can provide good references.

Our goal has consistently been to act as an enabler for firms who want to do better business – commercially, intelligently and ethically. Hopefully our longevity proves that we have had some success.

A Meeting of Minds is our flagship programme of biannual events which brings the most senior decision makers within a sector of financial services.

To see our full Calendar of Events
for 2025, please [click here](#).

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If you would like to discuss your potential participation in
Scotland Meeting of Minds, please do call John Hall on 01483 862696 or email
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