



A Meeting of Minds Advisory Distributors

Thursday 25 June 2026 – Tylney Hall Hotel & Gardens, Ridge Lane, Hook, RG27 9AZ

Oak Room Restaurant	24 June	Drinks and Formal Dinner	Dinner will be served at 19:45
Schedule of the Day			
Library Bar	0815-0900	Breakfast	Informal networking - Over breakfast and coffee
Tylney Suite	0900-0920	Keynote	Welcome - Incorporating the highlights of the Scene Setter research. With James Goad , MD, Owen James
Tylney Suite	0920-1000	Keynote	Expert insights on the geopolitical and economic landscape
Breakout Rooms	1005-1115	Roundtable Session	<i>Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables</i>
Library Bar	1115-1135	Coffee	Grab a refreshment and catch up with your peers
Tylney Suite	1135-1205	Networking	Structured networking - An opportunity to meet some new faces
Breakout Rooms	1210-1320	Roundtable Session	<i>Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables</i>
Oak Room	1320-1420	Lunch	A seated formal lunch
Tylney Suite	1425-1500	Keynote	Your Clients Don't Get It: The biggest risk facing financial services. With Dan Russell , industry thought leader and Founder of financial capability platform, Funkled
Breakout Rooms	1505-1615	Roundtable Session	<i>Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables</i>
Tylney Suite	1620-1650	Keynote	The Body Language Advantage: How to influence, convince and connect in business. With Martin Brooks , body language expert and author
Library Bar	1700-1800	Farewell and Fizz	We thank you for joining us over a glass of bubbly

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A MEETING OF MINDS ADVISORY DISTRIBUTOR ROUNDTABLE THEMES

Thursday 25th June, Tylney Hall and Gardens, Hook, Hampshire

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ROUNDTABLE THEMES TABLED FOR DISCUSSION:

ECONOMICS & GEOPOLITICS

1. What kind of firm will be most valuable in three years' time?

This session will explore:

what qualities are starting to command premium valuations in advisory businesses
whether legacy firms are becoming structurally less attractive
how buyers are reassessing risk in relation to data, AI, people and platform dependence
what leadership teams should prioritise if they want to build long-term value

REGULATORY CHANGE

2. Retirement propositions after the FCA review: what has actually changed?

This session will explore:

how firms have adapted retirement propositions since the thematic review
where cashflow modelling, risk assessment and portfolio construction are still misaligned
how firms are evidencing good retirement outcomes under Consumer Duty
whether CRPs are genuinely evolving or simply being relabelled

3. Advice, guidance and targeted support: who will really win this new middle ground?

This session will explore:

whether simplified advice is becoming a practical route to growth
how firms are thinking about segmentation, permissions and commercial viability
whether large institutions will dominate targeted support by default
how firms can avoid creating propositions that are operationally elegant but commercially weak

YOUR BUSINESS

4. Integration after the deal: where value is really won or lost

This session will explore:

what the best consolidators are doing differently before and after completion
how firms assess cultural fit beyond shareholders and leadership
where integration most often breaks down across systems, people and client service
what "good" looks like in acquisition governance and operating model clarity

5. Client value in a fee-sensitive world: what are firms actually defending?

This session will explore:

how firms are reframing value as planning becomes more central than investment management
whether client pricing still reflects actual delivery economics
where firms are simplifying propositions to improve clarity and trust
how fair value, accessibility and profitability can be balanced more credibly

6. The planning-led firm: is investment management becoming less central?

This session will explore:

whether financial planning is now the true driver of client value and retention
how firms should rebalance their proposition between planning, portfolio and platform
whether investment capability is becoming a hygiene factor rather than a differentiator
what this means for talent, pricing and business design

YOUR CLIENTS

7. Advice gap economics: what does a scalable sub-£250k proposition really look like?

This session will explore:

what delivery models are genuinely working for lower and mid-value clients
where coaching, simplified advice and hybrid propositions create value
how firms should think about pricing, ownership of the client relationship and cost-to-serve
whether this segment is a future growth engine or still commercially unattractive

8. Intergenerational planning after the tax changes: how are firms rewriting the playbook?

This session will explore:

how firms are changing accumulation and decumulation strategies in response to new rules
whether pensions, VCTs and business relief are being repositioned within mainstream planning
what advisers are doing differently to involve spouses and children earlier
how bereavement support and digital legacy planning can improve asset retention

YOU & YOUR PEOPLE

9. The future adviser pipeline: are firms building the wrong talent model?

This session will explore:

whether firms are designing career paths around today's clients or yesterday's model
how AI changes the role of juniors, paraplanners and future advisers
where life experience, human skills and technical training should sit in the talent mix
how firms can create more credible long-term talent pipelines

TECHNOLOGY & INNOVATION

10. AI after the pilot phase: what does scaled adoption actually look like?

This session will explore:

what successful AI implementation looks like beyond note-taking and report drafting
how firms are redesigning workflows, controls and roles around AI
what governance, data and operating model changes are needed to scale safely
whether AI readiness is starting to affect competitiveness and valuation

11. The future tech stack: build, buy or assemble?

This session will explore:

whether firms should keep assembling ecosystems or move toward fewer strategic providers
what good looks like in platform, CRM and workflow integration
how data ownership should influence build-vs-buy decisions
which parts of the stack now create the biggest economic drag

12. From platform user to platform owner: what does control really buy you?

This session will explore:

what firms gain from owning more of the client and technology experience
where platform ownership strengthens economics, branding and retention
when proprietary infrastructure becomes a distraction rather than an advantage
whether phased or segmented models are more realistic than full migration

PRODUCTS & PROPOSITION

I3. Designing propositions for longer retirements: certainty, flexibility or growth?

As retirement lengths extend and client circumstances become more complex, traditional product silos are increasingly misaligned with real client needs. Firms are rethinking how retirement propositions blend income certainty, investment flexibility and long-term growth.

This session will explore:

- how firms are redesigning retirement propositions for clients facing 30–40 year retirement horizons
- whether guaranteed income, drawdown flexibility and growth assets are being combined effectively
- how advisers balance sequencing risk, longevity risk and behavioural risk in product design
- whether innovation is being led by genuine client need or product provider agendas
- how firms ensure retirement propositions remain simple to explain but robust in delivery

I4. Proposition Simplification: Are Clients Paying for Complexity or Clarity?

As propositions expand to include planning, platform, portfolios and tax wrappers, many firms risk layering complexity that clients neither value nor understand. In a Consumer Duty environment, clarity is becoming a competitive advantage.

This session will explore:

- whether increasingly complex centralised propositions are improving outcomes or obscuring value
- how firms can simplify product menus without weakening differentiation
- where packaged solutions, model portfolios and retirement propositions genuinely add value
- how clearer proposition design can improve client understanding, pricing confidence and operational efficiency