



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				
Breakout Rooms	0815-0900	Breakfast Briefing	Managing the Unmanageable: Keeping clients invested through geopolitical uncertainty. Schroders				
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	New Friends And Old Enemies: What the world thinks the New World Order should look like. With James Kanagasooriam , Chief Research Officer, Focaldata				
Breakout Rooms	1005-1115	Roundtable Session	<i>AI after the pilot phase - what scaled adoption actually look likes</i>	<i>Strategies for client retention, acquisition, and long-term value</i>	<i>Behavioural nudges to improve investor outcomes</i>	<i>Women, wealth and winning the next generation of clients</i>	<i>The future adviser pipeline - building the talent model</i>
Library Bar	1115-1140	Coffee	Grab a refreshment and catch up with your peers				
Tylney Suite	1140-1210	Networking	Structured networking - An opportunity to meet some new faces				
Breakout Rooms	1215-1325	Roundtable Session	<i>Are we moving beyond the annual review?</i>	<i>what it takes to scale in a hypercompetitive market</i>	<i>Are clients paying for complexity or clarity?</i>	<i>Estate planning solutions in a changing tax landscape</i>	<i>From platform user to platform owner - what does control buy you?</i>
Oak Room	1325-1420	Lunch	A seated formal lunch				
Tylney Suite	1425-1500	Keynote	The Body Language Advantage: How to influence, convince and connect in business. With Martin Brooks , body language expert and author				
Breakout Rooms	1505-1615	Roundtable Session	<i>Integration after the deal - where value is won or lost</i>	<i>The vertically integrated wealth firm - where is value really created?</i>	<i>Designing propositions for longer retirements</i>	<i>Intergenerational planning after the tax changes - rewriting the playbook</i>	
Tylney Suite	1620-1650	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				
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 DISTRIBUTORS

ROUNDTABLE THEMES

Thursday 25 June 2026, Tylney Hall, Hook, Hampshire

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ROUNDTABLE THEMES TABLED FOR DISCUSSION

GEOPOLITICS & THE ECONOMY

1. **Managing the Unmanageable: Keeping clients invested through geopolitical uncertainty**

Geopolitical instability has become a persistent feature of the global economy, yet markets have historically rewarded long-term discipline rather than short-term reaction. This session will explore how investors and advisers can navigate geopolitical disruption, without allowing short-term noise to derail long-term financial planning objectives as well as long-term investment strategy.

We'll discuss how investment expertise and financial planning principles combine to support better client outcomes during periods of geopolitical uncertainty.

Discussion to include:

- Why markets often absorb geopolitical shocks more quickly than expected
- The danger of reacting tactically to every political headline and why our investment capabilities matter more now than ever
- How long-term investors incorporate geopolitical uncertainty into portfolio thinking and how this makes your client journey less volatile, maintaining their confidence in staying invested
- The role of financial planning in keeping clients focused on long-term goals, even amid heightened uncertainty
- How advisers help clients maintain discipline when the news cycle encourages the opposite
- Why active management doesn't have to cost as much as you might think

Expert: Tim Carr, Investment Director, Schroders

REGULATORY CHANGE

2. **Are we moving beyond the annual review?**

The FCA's latest proposals (CP26/10) signal a potential shift away from rigid annual suitability reviews toward more flexible, client-driven servicing models. This could fundamentally reshape how firms deliver, evidence and price ongoing advice. This session will therefore:

- Understand the implications of CP26/10 for advisory firms
- Explore whether periodic or event-driven reviews can deliver better client outcomes
- Assess the impact on servicing models, segmentation and adviser capacity
- Examine how firms can evidence ongoing suitability under Consumer Duty
- Discuss the commercial implications for fee models and client expectations

Expert: Clive Gordon, Practice Lead – Consumer Investments, Sicsic Advisory

YOUR BUSINESS

3. **Women, wealth and winning the next generation of clients**

With women set to control an ever-growing share of global wealth, it has never been more vital for advisory firms to deepen their understanding of female clients' needs.

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Join us for a thought-provoking session where we'll explore why women can often feel disconnected from traditional financial planning, how generational shifts are reshaping financial behaviours, and discuss practical strategies to engage families and navigate the Great Wealth Transfer.

Whether you're looking to future-proof your advice business or build deeper, more trusted relationships with clients, this session will deliver actionable insights you won't want to miss.

Expert: George Pullar, Partnership Development Manager, LV=

4. Rethinking organic growth - what it takes to scale in today's hypercompetitive market

Organic growth is becoming harder, more expensive, and less predictable.

The pool of high-value clients is limited, acquisition costs are rising, and traditional channels, particularly referrals, are no longer sufficient to support ambitious growth targets.

As competition intensifies, growth is no longer just a commercial question, but a strategic one - with implications for operating model design and long-term firm value.

This session will explore how growth dynamics are shifting and how leadership teams are responding, by asking:

- Why is organic growth becoming structurally harder?
- How are rising acquisition costs reshaping growth strategy and ROI expectations?
- How growth strategies impact enterprise value, exit readiness, and business resilience
- What structural changes are required to deliver scalable, repeatable growth?

Expert: Tim Grimsditch, Managing Director, Unbiased

5. Strategies for client retention, acquisition, and long-term value

What really moves the needle on growth? This session unpacks how leading firms are winning and retaining clients - from smarter segmentation to engaging the next generation - and how to measure what actually matters, by exploring:

- How product development and broader propositions can increase share of wallet and deepen client relationships
- The role of segmentation and proposition design in improving retention and scalable growth
- How firms engage spouses, families and next-generation beneficiaries more effectively
- How growth, retention and client value should be measured and incentivised

Expert: David Newman, CEO, Firenze

6. Integration after the deal - where value is really won or lost

With consolidation continuing across the sector, integration remains the key determinant of deal success. This session will focus on where value is created - or destroyed - post-acquisition. This session will:

- Understand what leading consolidators are doing differently
- Explore how firms assess cultural fit beyond leadership
- Identify where integration breaks down across systems, people and clients
- Define what "good" looks like in governance and operating models

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- Assess how firms measure post-deal success beyond financial metrics

Expert: Vincent Tiseo, Managing Director, Global head of Business Strategy, GSAM

7. The vertically integrated wealth firm - where is value really created?

As firms seek greater control over client relationships, margins and long-term enterprise value, vertically integrated wealth models are gaining momentum.

For some, deeper ownership across advice, platform and investment capabilities represents a significant strategic advantage. For others, it raises questions around operational complexity, governance, scalability and capital intensity.

This session will explore why firms are increasingly reassessing where they sit within the wealth value chain, by asking:

- What strategic advantages are driving firms toward more vertically integrated models?
- How much of this momentum is being accelerated by private equity ownership and the pursuit of scalable enterprise value?
- Where is value genuinely created - and where is complexity simply being internalised?
- What are the operational, governance and regulatory implications of controlling more of the client proposition?
- How should firms evaluate whether greater vertical integration aligns with their long-term business strategy?
- What lessons can be learned from firms that have already expanded across the value chain?

YOUR CLIENTS

8. Behavioural nudges to improve investor outcomes

As firms increasingly use behavioural design to influence client decisions, the focus is shifting from engagement to outcomes. This session will explore how firms can use nudges responsibly, avoiding manipulation while supporting better long-term investor behaviour, including:

- How behavioural nudges can support improved investor decision-making and outcomes
- The risks of “dark patterns”, over-gamification and overly complex interfaces
- How firms can measure success based on client progress rather than engagement
- How design principles can balance simplicity, empathy and commitment
- How behavioural strategies align with long-term client trust and firm incentives

Expert: Georgina Yarwood, Senior Investment Strategist, Vanguard

9. Intergenerational planning after the tax changes - how are firms rewriting the playbook?

Tax changes are reshaping how firms approach wealth transfer, creating a growing tension between securing retirement income and enabling earlier gifting. This session will:

- Examine how firms balance retirement security with lifetime gifting
- Explore how “capacity to gift” is being defined and communicated
- Assess the role of cashflow modelling in IHT decision-making

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- Identify how retirement and estate planning are becoming more integrated
- Explore earlier family engagement and retention strategies

Expert: Gareth Davies, Pension Specialist, Scottish Widows

YOU & YOUR PEOPLE

10. The future adviser pipeline - are firms building the wrong talent model?

With adviser shortages and changing client expectations, firms are rethinking how they attract and develop talent. This session will:

- Assess whether current career paths reflect future needs
- Explore how AI is reshaping adviser and support roles
- Identify the right balance of technical and human skills
- Discuss how to build sustainable talent pipelines

Expert: Vincent Tiseo, Managing Director, Global head of Business Strategy, GSAM

TECHNOLOGY & INNOVATION

11. AI after the pilot phase - what does scaled adoption actually look like?

Many firms have experimented with AI, but few have embedded it at scale. This session will focus on what successful adoption looks like. This session will:

- Identify where AI is delivering value beyond basic use cases
- Explore how workflows and roles are being redesigned
- Assess how data quality is limiting AI effectiveness
- Understand governance and operating model requirements
- Evaluate AI as a competitive differentiator

Expert: Jonny Rayner, Principal Solutions Consultant, Dynamic Planner

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

Some firms are moving to own more of their technology and client experience. This session will explore whether greater control delivers value, by looking at:

Platform ownership:

- What it means – phased vs full ownership

The pros and the cons:

- Who it's right for and who it's not
- The commercial reality – considering both the growth opportunity and the costs associated
- How data can help client retention and personalisation

Expert: Chris Calvoressi & Dan Giddings, Sales Directors, Wealth Management, SS&C

PRODUCTS & PROPOSITION

13. Estate planning solutions in a changing tax landscape

As legislative changes reshape the treatment of pensions and wealth transfer, firms are being forced to rethink how estate planning is structured within client propositions. This session will focus on how advisers translate strategy into practical, scalable solutions, by exploring the following:

- The impact of upcoming IHT changes, including the April 2027 pension reforms
- How firms structure tax-efficient wealth transfer within client propositions, including asset sequencing and prioritisation
- How delayed planning compresses available options and increases complexity
- The role of trust and investment-based solutions, including Gift, Loan, Discounted Gift, Reversionary Interest and Business Relief structures
- How firms support trustees within a robust and scalable advice framework

Expert: Andrew Fear, Investment Specialist, M&G

14. 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

Expert: Paul Speight, Head of National, Network & International Distribution, RBC Brewin Dolphin

15. Proposition simplification - are clients paying for complexity or clarity?

As propositions become more layered, firms risk creating complexity that undermines client understanding and trust. This session will:

- Assess whether complexity improves outcomes or obscures value
- Explore how to simplify without losing differentiation
- Examine MPS vs unitised MPS and structural choices
- Evaluate the role of ETFs, private markets and product innovation
- Improve clarity, pricing confidence and efficiency

Expert: Tom Morey, Multi-Asset Investment Specialist, HSBC Global Asset Management (UK) Limited