Meeting of Minds: Wealth Management & Private Banking

Thursday 12 November 2026 – The Berkeley Hotel, Wilton Place, London, SW1X 7RL

Schedule of the Day			
Belgravia	0815-0900	**Breakfast**	**Informal networking** - Over breakfast and coffee
The Ballroom	0900-0920	**Keynote**	**Welcome** - Incorporating the highlights of the Scene Setter research. With **James Goad,** Managing Director, Owen James
The Ballroom	0920-1000	**Keynote**	**Geopolitics 2026: Risks, power & the new global order**
Breakout Rooms	1005-1115	**Roundtable Session**	*Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables*
Belgravia	1115-1140	**Coffee**	Grab a refreshment and catch up with your peers
The Ballroom	1140-1210	**Networking**	**Structured networking** - An opportunity to meet some new faces
Breakout Rooms	1215-1325	**Roundtable Session**	*Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables*
The Ballroom	1325-1500	**Lunch**	**A seated formal lunch**
The Ballroom	1430-1500	**Keynote**	**From Insight to Impact – making better choices in the age of intelligent decisions**
Breakout Rooms	1505-1615	**Roundtable Session**	*Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables*
The Ballroom	1620-1650	**Keynote**	**Winning Behaviours: From disruption to opportunity**
Belgravia	1650-1800	**Farewell and Fizz**	We thank you for joining us over a glass of bubbly.

a meeting of MINDS

owenjames

A MEETING OF MINDS WEALTH MANAGEMENT AND PRIVATE BANKING

ROUNDTABLE THEMES

Thursday 12 November 2026, The Berkeley Hotel, London

Contents

Agenda overview:

As the industry enters a new era of AI, changing client expectations, evolving regulation and structural market shifts, success increasingly depends on building businesses that are more productive, more scalable and more resilient.

Meanwhile, the greatest source of competitive advantage will be defined by how effectively firms build organisational capability - developing people, strengthening client relationships and forming strategic partnerships that extend far beyond investment management.

The agenda is designed to help senior leaders move beyond reacting to today's challenges and towards building the capabilities that will define tomorrow's market leaders.

ROUNDTABLE THEMES TABLED FOR DISCUSSION

GEOPOLITICS & THE ECONOMY

1. The UK Wealth Opportunity – Scale, growth and untapped potential

The UK wealth market continues to grow, yet capturing that opportunity is becoming increasingly challenging. Demographic change, intergenerational wealth transfer, consolidation and evolving client expectations are reshaping where growth comes from and how firms compete. This session will explore:

- Where the greatest growth opportunities exist across the UK wealth market
- How consolidation is reshaping the competitive landscape
- The commercial implications of demographic and wealth transfer trends
- Whether firms are investing in the right capabilities for long-term growth
- What will define the next generation of successful wealth businesses

2. Beyond Diversification – Portfolios for a structurally different world

Traditional portfolio construction is being challenged by geopolitical fragmentation, technological disruption, persistent inflation and changing sources of return. Diversification is no longer simply about asset allocation, but about building resilience for an increasingly uncertain world.

This session will explore:

- How geopolitical change is reshaping strategic asset allocation
- Whether traditional diversification remains sufficient
- The evolving role of infrastructure, alternatives and private markets
- Managing concentration risk in increasingly concentrated markets
- Building portfolios capable of performing across multiple economic regimes

REGULATORY CHANGE

3. Wealth Management M&A - After the FCA's Consolidation Review

The FCA's review of consolidation has reinforced that growth through acquisition brings increasing expectations around governance, oversight and client outcomes. As transactions continue across the market, firms must demonstrate that scale enhances rather than compromises client value.

This session will explore:

- The FCA's expectations following its consolidation review
- Integration challenges beyond systems and processes
- Governance, culture and Consumer Duty within larger organisations
- How technology and AI due diligence are influencing transactions
- What sustainable consolidation looks like over the next decade

4. The Advice Continuum – Expanding up and down the wealth curve

Advice is becoming increasingly flexible. From targeted support and simplified advice through to holistic financial planning and discretionary management, firms are rethinking how they engage clients across different wealth segments.

This session will explore:

- How targeted support could reshape commercial models
- Serving emerging affluent clients profitably
- Balancing accessibility with premium propositions
- The future relationship between guidance, advice and discretionary management
- Building lifetime client relationships across the advice continuum

YOUR BUSINESS

5. Growth by Design – Why operating models are becoming the competitive advantage

Organic growth remains the industry's biggest strategic priority, yet many firms continue to pursue growth through increasingly complex operating models. The firms creating sustainable growth are increasingly those redesigning how work gets done rather than simply adding more resources.

This session will explore:

- Why operational simplicity is becoming a competitive advantage
- Removing friction from client journeys
- Building scalable operating models
- Creating capacity without increasing cost
- The operating model of tomorrow's wealth business

6. Winning Share of Wallet – The growth opportunity firms already own

As client acquisition becomes more expensive and competitive, many firms are overlooking the greatest growth opportunity within their existing client relationships.

This session will explore:

- Increasing lifetime client value
- Deepening relationships across families
- Unlocking referral opportunities
- Using segmentation to identify commercial potential
- Building growth from existing client banks
- Expanding relationships through broader wealth capabilities, including lending, philanthropy and family governance

7. Enterprise Value – What will make wealth firms more valuable over the next decade?

Firm valuations are increasingly influenced by more than assets under management or profitability. Buyers are looking at technology maturity, governance, recurring revenues, data quality and operational resilience as indicators of long-term value.

This session will explore:

- What drives premium valuations today
- How AI readiness and data maturity influence value
- The relationship between productivity and enterprise value
- Governance as a driver of business resilience
- Preparing firms for future strategic opportunities
- Whether AI capability and workforce readiness are becoming indicators of enterprise value

YOUR CLIENTS

8. Behavioural Advantage – Improving client decisions in an uncertain world

Markets may drive performance, but behaviour continues to determine outcomes. As volatility, misinformation and digital engagement increase, firms are increasingly looking to behavioural science to improve client decision-making and strengthen long-term relationships.

This session will explore:

- Helping clients make better long-term decisions
- Using behavioural science to improve engagement
- Communicating uncertainty with confidence
- Building trust during periods of market volatility
- Designing client journeys that encourage better outcomes

9. Pricing Power – Demonstrating value in a transparent market

Fee transparency continues to increase while client expectations continue to evolve. Firms are increasingly recognising that demonstrating value has become as important as delivering investment performance.

This session will explore:

- How firms articulate value beyond portfolio returns
- Pricing models in an increasingly transparent market
- Building trust through clearer communication
- Consumer Duty and evidencing ongoing value
- Maintaining pricing power through stronger client relationships

TECHNOLOGY & INNOVATION

10. AI as Infrastructure - The intelligent wealth business

AI has moved beyond experimentation. The challenge is no longer identifying use cases, but redesigning businesses around intelligent systems that improve decision-making, client engagement and operational performance.

This session will explore:

- Moving from AI pilots to enterprise-wide transformation
- Building AI-enabled operating models
- Agentic AI and autonomous workflows
- Governance frameworks that support innovation
- Measuring commercial return on AI investment
- How firms develop the organisational capability needed to realise AI's full potential

11. Data First – The foundation for the intelligent wealth business

Artificial intelligence is only as powerful as the data that supports it. As firms accelerate digital transformation, data is becoming a strategic asset that underpins every aspect of business performance.

This session will explore:

- Creating a trusted, connected data foundation
- Improving governance and accountability
- Enabling AI through better data architecture
- Integrating fragmented technology ecosystems
- Turning data into commercial advantage

YOU & YOUR PEOPLE

12. Adviser Capacity – The new productivity premium

Demand for advice continues to grow, yet adviser capacity remains constrained. The firms that create sustainable productivity gains will be best positioned to grow without compromising client outcomes.

This session will explore:

- Measuring productivity beyond utilisation
- Creating adviser capacity through AI and automation
- Redesigning roles across advice businesses
- Removing operational bottlenecks
- Building a high-performing advice organisation

13. The AI-enabled Workforce – Capability beyond technology

Artificial intelligence is transforming every part of the wealth management business, but the greatest challenge is no longer selecting the right technology. Success increasingly depends on equipping advisers, client service teams, operations and support functions with the confidence, skills and governance needed to use AI effectively. Firms that develop organisation-wide AI capability today may gain a significant competitive advantage tomorrow.

This session will explore:

- How to build AI capability across the entire business, not just within technology teams
- Upskilling non-technical colleagues to unlock productivity gains
- Whether firms should establish AI competency frameworks and professional standards
- Creating a culture where AI enhances judgement rather than replacing it
- Encouraging responsible adoption while maintaining governance and trust
- Whether becoming AI-ready could become a source of competitive differentiation

PRODUCTS & PROPOSITION

14. Private Markets – Strategic allocation or competitive overreach

Private markets continue to attract increasing client interest, yet questions remain around implementation, liquidity, governance and commercial suitability.

This session will explore:

- The evolving role of private markets in diversified portfolios
- Balancing opportunity with liquidity considerations
- Communicating complexity to clients
- Governance frameworks for alternative investments
- Whether private markets should become strategic allocations

15. Beyond Investment – What advisers really want from wealth partners

As investment expertise becomes increasingly accessible, advisers are placing greater emphasis on the quality of the partnership behind the proposition. Service, financial strength, consistency, broader wealth capabilities and long-term strategic alignment are becoming just as important as investment performance. The conversation is shifting from selecting products to choosing partners that help firms deliver better client outcomes.

This session will explore:

- What genuinely differentiates one wealth or investment partner from another
- How firms assess financial strength, organisational resilience and long-term commitment
- Whether consolidation strengthens or weakens adviser relationships and service
- The growing role of co-manufacturing and strategic partnerships
- Expanding propositions through lending, philanthropy and specialist capabilities
- Building partnerships that strengthen both adviser businesses and client outcomes