

Meeting of Minds: Wealth Management & Private Banking

Thursday 11 June 2026 – The Berkeley Hotel, Wilton Place, London, SW1X 7RL

Schedule of the Day

Belgravia	0815-0900	Breakfast	Informal networking - Over breakfast and coffee				
Knightsbridge	0815-0900	Breakfast Briefing	Why not all infrastructure is created equal. With Lazard				
The Ballroom	0900-0920	Keynote	Welcome - Incorporating the highlights of the Scene Setter research. With James Goad , Managing Director, Owen James				
The Ballroom	0920-0930	Keynote	How leading wealth managers are outperforming their peers. With James Brown , CEO, BWC Benchmarking				
The Ballroom	0930-1000	Keynote	It was the best of times, it was the worst of times. With Guy Opperman , former Minister for Pensions				
Breakout Rooms	1005-1115	Roundtable Session	<i>Organic growth in a consolidating world, building a scalable wealth business</i>	<i>Behavioural nudges to improve investor outcomes</i>	<i>AI ambition vs technology reality</i>	<i>Yield without illusion - rethinking income, risk and portfolio design</i>	<i>Portfolio construction in an age of geoeconomics</i>
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	<i>Unlocking organic growth - from adviser capability to measurable productivity</i>	<i>The next generation wealth model - growth, retention and accessibility</i>	<i>Data first - the foundation for AI driven insight and global scale</i>	<i>New client acquisition without price erosion</i>	<i>Modernise without disruption - navigating technology debt at low risk</i>
The Ballroom	1325-1425	Lunch	A seated formal lunch				
The Ballroom	1430-1500	Keynote	The Trust Advantage: What organised crime can teach us about growth, influence and leading through change. With Nikki Bhamra , former senior crime investigator and human behaviour expert				
Breakout Rooms	1505-1615	Roundtable Session	<i>The UK wealth opportunity - scale, growth and untapped potential</i>	<i>From Complexity to Clarity: A Blueprint for Modern Investment Operations</i>	<i>AI beyond pilots - operational redesign or incremental efficiency?</i>	<i>Wealth Management M&A after the FCA's consolidation review</i>	
The Ballroom	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				
Belgravia	1650-1800	Farewell and Fizz	We thank you for joining us over a glass of bubbly.				

A MEETING OF MINDS WEALTH MANAGEMENT AND PRIVATE BANKING

ROUNDTABLE THEMES

Thursday 11 June 2026, The Berkeley Hotel, London

Contents

GEOPOLITICS & THE ECONOMY 2

1. Portfolio construction in an age of geoeconomics 2

REGULATORY CHANGE 2

2. Wealth Management M&A after the FCA’s consolidation review 2

YOUR BUSINESS 2

3. The UK wealth opportunity - scale, growth and untapped potential..... 2

4. New client acquisition without price erosion..... 3

5. Organic growth in a consolidating world - building a resilient, scalable wealth business..... 3

6. The next generation wealth model - growth, retention and accessibility..... 3

YOUR CLIENTS 4

7. Behavioural nudges to improve investor outcomes 4

8. Values-based wealth - strategic differentiator or commercial risk?..... 4

TECHNOLOGY & INNOVATION 4

9. AI beyond pilots - operational redesign or incremental efficiency? 4

10. Modernise without disruption - navigating technology debt at low risk..... 5

11. AI ambition vs technology reality - can wealth firms innovate on legacy foundations? 5

12. Data first - the foundation for AI driven insight and global scale in wealth management..... 5

YOU & YOUR PEOPLE 6

13. Unlocking organic growth - from adviser capability to measurable productivity..... 6

PRODUCTS & PROPOSITION 6

14. Yield without illusion - rethinking income, risk and portfolio design..... 6

15. Why not all infrastructure is created equal..... 7

16. From complexity to clarity - a blueprint for modern investment operations..... 7

ROUNDTABLE THEMES TABLED FOR DISCUSSION

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GEOPOLITICS & THE ECONOMY

1. Portfolio construction in an age of geoeconomics

Geopolitical instability, fiscal expansion, and industrial policy are reshaping capital flows in ways that challenge traditional diversification assumptions. With concentration risk elevated and regional policy divergence widening, private banks must consider whether existing portfolio models are sufficiently resilient for the next cycle.

This session will focus on macro-structural allocation shifts to explore how leaders should rethink strategic asset allocation in a more interventionist and fragmented world, including:

- Whether US concentration risk represents structural vulnerability or enduring leadership.
- The role of real assets, infrastructure, and defensive equity strategies in protecting client capital.
- Communicating macro uncertainty to HNW and UHNW clients without driving reactive behaviour.

Expert: Seema Shah, Chief Strategist, Principal Asset Management

REGULATORY CHANGE

2. Wealth Management M&A after the FCA's consolidation review

The FCA's review of consolidation in the wealth management sector has sharpened focus on how acquisitions are financed, governed and integrated. As regulatory scrutiny increases, firms pursuing consolidation strategies must now consider not only growth and valuation, but also operational resilience, governance quality and long-term sustainability.

This session will explore how the FCA's evolving expectations are reshaping M&A activity across the sector, by asking:

- How is the FCA's consolidation review changing deal structures and acquisition strategy?
- What concerns does the regulator have around leverage, governance and offshore structures?
- How should buyers and sellers prepare for increased scrutiny during transactions?
- Where are firms most exposed post-acquisition from a governance and integration perspective?
- What practical lessons are emerging from recent deal activity across the sector?

Expert: Farrer & Co

YOUR BUSINESS

3. The UK wealth opportunity - scale, growth and untapped potential

Despite intense competition for high-value clients, significant segments of the UK wealth market remain underserved or under-engaged. Yet many firms still struggle to scale acquisition efficiently, segment clients effectively, or deliver propositions that balance profitability with accessibility.

This session will explore where the next phase of growth is likely to come from — and which firms are best positioned to capture it, by asking:

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- Which client segments represent the largest untapped commercial opportunity for wealth firms over the next 5–10 years?
- Are existing advice and wealth management service models structurally capable of serving these segments profitably?
- How should firms balance scale, segmentation and personalisation in the above context?

Experts: Andre Bastos, Head of Product, Allfunds

4. New client acquisition without price erosion

Sourcing new clients remains a core strategic priority, yet fee compression and heightened competition risk turning growth into margin dilution. The question for leadership teams is how to win selectively and sustainably.

This session will explore growth strategy in a competitive market, in order to:

- Identify the most commercially attractive client segments over the next 3–5 years.
- Debate whether overseas expansion and niche targeting offer genuine differentiation.
- Share strategies for winning mandates without defaulting to price discounting.
- Examine the role of brand, trust, and proposition clarity in competitive positioning.

Expert: Mark Trousdale, President, Europe & Chief Growth Officer, Communify

5. Organic growth in a consolidating world - building a resilient, scalable wealth business

Leadership teams are grappling with a fundamental tension: organic growth demands consistency, simplicity, and repeatability. Yet many firms find increasing complexity across systems, data, vendors, products, and operating models as they scale. This session will explore why organic growth is proving so elusive by asking:

- Is simplification a prerequisite for sustainable, scalable organic growth?
- Where does operational complexity most directly undermine productivity, control, and decision-making?
- How are disparate systems and fragmented data hindering organic growth?
- How are c-suite leaders measuring productivity improvements that strengthen, rather than compromise, control, and resilience?

Expert: SEI

6. The next generation wealth model - growth, retention and accessibility

As targeted support and simplified advice move closer to implementation, firms are increasingly reassessing how advice, guidance and discretionary services should evolve across different client segments. The challenge is no longer simply how to retain intergenerational wealth, but how to engage future inheritors and emerging affluent clients early enough - often before they can justify the cost of traditional wealth management models.

This session will explore how firms can expand relationships both up and down the wealth curve, by asking:

- How can firms engage and retain next-generation clients before major wealth transfer events occur?

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- Does the emerging advice continuum create a commercially viable route to serving emerging affluent and mass affluent clients at scale?
- How should firms differentiate between discretionary, advisory, targeted support and digital-first engagement models across client segments?
- Can targeted support deepen future client relationships without cannibalising full advice propositions?
- What role do digital engagement, financial education and purpose-led advice play in attracting younger investors?
- How can firms balance accessibility, profitability and regulatory proportionality while maintaining a premium client experience?

YOUR CLIENTS

7. 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: Andy Reed, Head of behavioural economics research, Vanguard

8. Values-based wealth - strategic differentiator or commercial risk?

The impact economy is no longer peripheral. With the UK Government’s Office for the Impact Economy, rising client expectations and Consumer Duty scrutiny, values-based wealth management is shifting from optional overlay to core strategic capability.

This session will provide clarity on how leading firms are embedding values-based advisory models across the full client journey to drive growth, relevance and long-term trust, as well as examining:

- The regulatory and reputational risk of inaction
- Evidence on where commercial return is being realised

Expert: Philanthropy Impact

TECHNOLOGY & INNOVATION

9. AI beyond pilots - operational redesign or incremental efficiency?

AI experimentation is widespread, yet many firms remain in pilot mode. The next phase requires moving from incremental efficiency gains to structural redesign of workflows, governance, and team configuration.

This session will explore what it takes to industrialise AI across the enterprise, in order to:

- Identify where AI is genuinely transforming adviser workflows and client journeys.
- Debate whether legacy systems should be replaced or augmented.

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- Examine governance models that balance innovation with regulatory oversight.
- Share lessons from firms that have moved from experimentation to production.

Expert: Eddie Russell, Principal Consultant, Solve

10. Modernise without disruption - navigating technology debt at low risk

The firms that will move fastest over the next five years may not be those that replace the most systems, but those that build their technology ecosystems most intelligently.

Fragmented, ageing tech stacks made up of platforms, CRMs, portfolio systems and portals are a result of solutions being introduced at different stages to solve specific operational needs. Lack of true integration can slow innovation and make it harder to deliver a seamless client experience.

The question is no longer simply whether to replace legacy infrastructure, but how to modernise the operating model at minimal risk while continuing to serve clients and support your advisers and teams without disruption.

This session will explore:

- Whether legacy systems should be replaced or simply less relied on for key functions
- How firms can approach digital modernisation more strategically, minimising transformation, cost, risk and time
- Best practice guidance on how to avoid the pitfalls behind why 70% of IT projects fail

Expert: Tessa Lee, Managing Director, Moneyinfo

11. AI ambition vs technology reality - can wealth firms innovate on legacy foundations?

Many wealth firms want to scale AI, yet their data, workflows, and core systems are still fragmented. A key question is whether AI can truly deliver transformation without fixing the underlying infrastructure. This session will discuss the tension between AI industrialisation and tech debt, including:

- Can AI meaningfully improve adviser productivity without modern data architecture?
- Are firms layering AI on top of outdated workflows?
- When should firms modernise core systems vs augment them with AI tools?
- What operational redesign is actually required to unlock AI value?
- What role do modern wealth platforms play in enabling AI-driven operating models?

Expert: Milan Patel, Global Head of Sales Engineering, FA Solutions

12. Data first - the foundation for AI driven insight and global scale in wealth management

As wealth management firms expand globally and face increasing complexity, the ability to unlock timely, actionable insight from fragmented data has become a defining challenge. This session will focus on how firms are addressing persistent issues such as data silos, limited regional scalability, and the growing demand for real-time intelligence, by exploring:

- Emerging approaches including data consolidation into unified platforms, treating data as a product, and democratising access across organisations

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- The role of AI, particularly agentic and workflow-driven models, in enabling more efficient, auditable, and scalable data strategies
- How leading firms are evolving their data and AI capabilities to drive competitive advantage

Expert: Eric Baker, Senior Director, Product Management, Addepar

YOU & YOUR PEOPLE

13. Unlocking organic growth - from adviser capability to measurable productivity

In wealth and asset management, organic growth is increasingly determined by adviser and distribution effectiveness, client experience and share of wallet. Yet many firms still rely on broad enablement programmes and “golden time” metrics without a clear understanding of what actually drives growth and productivity.

This session will explore how firms can identify, measure and improve the drivers of adviser performance, using data-led insight and targeted interventions to unlock scalable organic growth.

This session will:

- Identify the behavioural and commercial traits most strongly correlated with organic growth
- Examine how firms segment adviser and distribution teams into meaningful performance cohorts
- Explore how targeted development interventions can outperform one-size-fits-all enablement programmes
- Debate what a high-performing RM/adviser time-allocation model actually looks like
- Discuss the KPIs that matter most at board level — from revenue per RM to client engagement and share of wallet
- Assess how automation and workflow redesign can release capacity without eroding culture or client experience
- Explore how firms reduce hiring risk through capability-led profiling and assessment-based selection

Expert: SBR Consulting

PRODUCTS & PROPOSITION

14. Yield without illusion - rethinking income, risk and portfolio design

As the hunt for income intensifies, investors are rethinking where yield comes from - and the risks that may come with it. With portfolios often heavily reliant on credit and the traditional 60/40 model under pressure, a more deliberate approach to portfolio design is emerging, focused on “engineering” outcomes through the use of tools such as options, downside protection mechanisms and defined income targets.

This roundtable will explore how allocators are balancing income, risk and long-term growth, including:

- Where sustainable yield exists today - and where risks may be hidden or misunderstood
- The trade-offs between dividend yield, premium income and capital appreciation
- Whether portfolios are overly reliant on credit, and how that exposure can be diversified or mitigated
- The balance between income today and long-term compounding

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- What comes next after the traditional 60/40 model
- The role of options and structured approaches (e.g. income overlays, downside buffers) in shaping risk and return
- The trade-off between complexity and clarity in portfolio design
- Whether outcome-oriented approaches can improve implementation efficiency across investment teams

Expert: Derek Fulton, Director and CEO, First Trust Global Portfolios

15. Why not all infrastructure is created equal

Infrastructure is increasingly positioned as a source of resilient income, inflation protection and diversification within private client portfolios. Yet recent market events have exposed major differences in asset quality, leverage structures and underlying risk, raising questions about whether all infrastructure investments deliver the defensive characteristics investors expect.

This session will explore how wealth managers should reassess listed infrastructure within portfolio construction, by asking:

- What role should listed infrastructure play in delivering diversification, income and capital preservation?
- Why are some infrastructure models more resilient than others in volatile macro and inflationary environments?
- How should investors distinguish between monopoly-like infrastructure assets and businesses exposed to commodity, regulatory or construction risk?
- What lessons should allocators draw from recent failures such as Thames Water?
- How should firms assess leverage, governance and structural risk when allocating to infrastructure strategies?

Expert: Bertrand Cliquet, Infrastructure Investor, Lazard Asset Management

16. From complexity to clarity - a blueprint for modern investment operations

As firms push forward with front-office innovation, many are finding that operational complexity— not ambition - is the real constraint. Rigid architecture, fragmented data, and inconsistent operating models are limiting the ability to scale, govern, and deliver outcomes.

This roundtable brings together executives to explore how leading firms are simplifying their operating environments - embracing more flexible, interoperable architectures, connecting workflows, strengthening control, and creating the clarity needed to support growth and innovation. This discussion will focus on what it takes to move from disconnected systems to a truly coherent, future-ready operating model.

- Where rigid architecture is constraining scale, agility, and control today
- The role of flexible, interoperable architecture in enabling change
- Connecting front, middle, and back office around a consistent operating model
- Delivering modernisation through targeted, phased approaches

Expert: Fadi El-Souki, Managing Director, SS&C Advent