

Meeting of Minds: Winning Advisers

Thursday 9 October 2025 – Tylney Hall Hotel & Gardens, Ridge Lane, Hook, RG27 9AZ

Oak Room Restaurant	1900-2200	Drinks and 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, Managing Director, Owen James and Tessa Lee, Founder & Managing Director at Moneyinfo				
Tylney Suite	0920-1000	Keynote	Five key unknowns shaping Britain – and why you need to know them. With James Kanagasooriam, Chief Research Officer, Focaldata				
Breakout Rooms	1005-1115	Roundtable Session	Intergenerational planning in a shifting tax landscape	Creating a proposition based on what the client wants	Retirement planning reimagined	Why does the market seem to not care about anything?	Embedding tech without losing the human touch
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	Delivering inclusive & emotionally intelligent advice	Improving business value by 'letting go to grow'	Securing the right clients with relationship-led expansion	Strategies for a longer life and a changing market	AI in practice – from tools to trust
Oak Room Restaurant	1320-1420	Lunch	A seated formal lunch				
Tylney Suite	1430-1500	Keynote	The Future of Work: How businesses can build the workforce skills for the economy of tomorrow. With Jimmy McLoughlin OBE, host of Jimmy's Jobs of the Future podcast				
Breakout Rooms	1505-1615	Roundtable Session	Standing out in a shrinking value chain through exceptional client value	Adapting your strategies to the fiscal policy changes	Charging models under scrutiny	Investment lessons from 17 years of fund research	
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 & Fizz	We thank you for joining us over a glass of bubbly				

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A MEETING OF MINDS WINNING ADVISERS

ROUNDTABLE THEMES

Thursday 9 October, Tynley Hall, Hook, Hampshire

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GEOPOLITICS & ECONOMICS

1. Adapting your strategies to the fiscal policy changes

From the pension reforms now in effect, to further changes expected for inheritance tax, capital gains and non-dom rules, advisers are having to interpret the practical implications of these changes when structuring advice as well as on long-term wealth planning.

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Meanwhile, with the Autumn Budget looming and ongoing welfare reform announcements, this session will explore:

- How pre-Budget speculation is shaping investor sentiment and client conversations.
- Preparing clients for possible tax and policy changes in pensions, inheritance and capital gains.
- Positioning financial planning as a source of clarity and confidence in uncertain times.
- How to navigate policy uncertainty with adaptive, scenario-based planning.
- How to position financial planning as a source of clarity, resilience and opportunity in a time of economic uncertainty.

2. Intergenerational planning in a shifting tax landscape

With inheritance tax rules evolving and pensions set to become part of the estate for IHT purposes from 2027, intergenerational planning is moving rapidly up the agenda. Advisers need to rethink how they structure wealth to ensure clients can pass it on efficiently, while balancing the opportunities and risks created by the latest policy changes.

This session will explore practical strategies for protecting and transferring wealth in the new environment, including the role of trusts and investment bonds, by discussing:

- How the inclusion of pensions in the estate for IHT purposes from 2027 changes the planning conversation
- Tax-efficient structures and trusts for wealth transfer, and when to use them
- Strategies for managing lump sums – from investment choices to writing assets in trust
- Helping clients navigate intergenerational objectives, balancing their own needs with those of their heirs

Expert: HSBC Life

3. Why does the market seem to not care about anything?

Albemarle Street Partners Managing Director, Charlie Parker, will explore why despite all the ‘bad’ things happening in the world, markets keep rising. Given the current economic and geopolitical backdrop, investors could be forgiven for fearing the worst. But the reality is our worries may be routed in the wrong things

Expert: Charlie Parker, Managing Director of Albemarle Street Partners

YOUR CLIENTS

4. Retirement planning reimagined - from policy shifts to personalised strategies

Retirement is no longer a single financial event - it's a complex life stage shaped by longer lifespans, evolving family dynamics and shifting client aspirations. This session will explore how advice firms can modernise their retirement conversations to focus on identity, wellbeing and flexibility, not just income and decumulation strategies, such as:

- Articulate retirement goals that go beyond financial metrics to include lifestyle, legacy and purpose.
- Understanding how recent pension and tax reforms are reshaping retirement decision-making and decumulation planning.
- Exploring the role of cashflow modelling, guaranteed income and whole-of-life cover in building adaptable strategies.
- Addressing the emotional, relational and gender-specific factors that influence retirement choices.

Expert: Scottish Widows

5. Strategies for a longer life and a changing market

Retirement is lasting longer - and growing more complex. Advisers must now build income strategies that respond to longevity risk, tax uncertainty, and shifting client preferences, while maintaining consistency and scalability in a changing regulatory landscape.

This session will focus on technical retirement income planning strategies by building robust, flexible retirement income strategies that align with client goals and market realities to discuss:

- A five-factor framework for income planning: longevity, income level, liquidity, volatility, and capital preservation
- When and how to integrate annuities into blended solutions - including deferred options
- The evolving drawdown conversation: from investment returns to psychological reassurance
- “Flex first, fix later” strategies and how to align them with risk profiles and life stages
- How to deliver scalable, compliant retirement solutions amid regulation and consolidation

Expert: Connor Stewart, Senior Investment Director, Standard Life

6. Delivering inclusive, intergenerational and emotionally intelligent advice

Women and next-gen clients are inheriting wealth in record numbers - yet many still switch advisers or feel underserved. Too often, advisers risk focusing on one decision-maker and missing the concerns of other family members.

This session will discuss how firms can deepen relationships across families, generations and gender lines, including:

- Understanding the priorities and dynamics of all parties in family planning conversations.
- Helping couples and families align values, goals, and expectations across generations.
- Avoiding unconscious biases in client engagement and ensuring inclusive advice.
- Strategies for deepening relationships and retaining assets through transitions.

7. Investment lessons from 17 years of fund research

Fundhouse rarely shares the findings of its in-depth fund research, making this a unique opportunity to gain insights into what fund managers do well (and poorly). Drawing on an extensive track record

and a highly detailed research process, this session goes behind the scenes to reveal which behaviours and processes drive success, and which do not.

- The types of investment processes that tend to work best and those that don't
- The oddity of fund managers making low odds decisions
- When business decisions impact investment portfolios
- How you, as advisers, can apply these insights to better coach your clients

Expert: Fundhouse

8. Standing out in a shrinking value chain through exceptional client value

Fee compression, platform innovation and digital DIY options are shifting client expectations fast. Rather than competing on price, many firms are winning loyalty – and higher fees – by delivering deeply personalised advice. This session will explore:

- Why clients are willing to pay more for tailored, human-centred advice in a commoditised world.
- How firms can evidence and articulate value to different client segments.
- Strategies for moving away from “cost-cutting” narratives and towards premium positioning.
- Differentiating in a world of increasing price transparency.
- Tackling client churn and price-based switching through relationship-led retention strategies.
- Evidencing ongoing value in line with Consumer Duty and segmented service models.
- Lifestyle-driven propositions that move beyond investment performance.

Expert: SEI

9. Creating a proposition based on what the client wants

Firms often design service propositions around internal assumptions or traditional wealth tiers – but how often do we stop to ask what clients actually value? This session will explore:

- Challenging long-held norms around frequency of reviews and “gold-standard” service tiers.
- Using client feedback to design propositions that are leaner, smarter and more valued.
- How to segment services without eroding client trust or perceived value.
- The time and cost savings of focusing on meaningful touchpoints rather than over-servicing.

YOUR BUSINESS

10. Improving business value by ‘letting go to grow’

In today's shifting regulatory and economic landscape, many firms are feeling the pressure to deliver a more personalised, higher-quality service, while also improving operational efficiency and profitability. Whether you're scaling, evolving your proposition, or planning for a future exit, this

session invites you to take a strategic step back and explore how re-thinking client segmentation can unlock new levels of growth, efficiency, and long-term business value. This session will discuss:

- The real drivers of sustainable profit, and why more isn't always more
- How to boost productivity without a costly tech overhaul
- Why releasing non-core clients can improve both efficiency and business value
- The role of exit planning in building a stronger, future-ready firm

Expert: Just Group

11. Securing the right clients with relationship-led expansion

Smarter growth doesn't always mean more clients. This session will focus on how to refine your proposition, generate advocacy and attract your ideal clients with intention and impact, through

- Rethinking segmentation for value, service and regulatory fit.
- Building structured systems for generating and rewarding referrals.
- Leveraging professional partnerships and introducers with consistency.
- Identifying compelling messaging that resonates with your target clients.
- Optimising your marketing and lead-generation ecosystem for measurable ROI.

12. Charging models under scrutiny

As Consumer Duty intensifies focus on fair value and transparency, many firms are reassessing whether their pricing still works for both clients and the business. This session explores how advisers are evolving charging models to match modern expectations, risk profiles and service delivery realities, by discussing:

- The viability of hourly, tiered, flat-fee, or hybrid charging models in today's landscape.
- How to align pricing with segmented service levels and client outcomes.
- How to communicate charges clearly, confidently and compliantly.
- How pricing strategy can support inclusion, access and fair value across different client types.

TECHNOLOGY & INNOVATION

13. AI in practice – from tools to trust

AI is already being used across planning, paraplanning and client comms - but how well is it working? This session will dive into practical use cases, oversight frameworks and the ethical guardrails that underpin trust by discussing real AI use cases, in order to:

- Discuss productivity wins, client reaction, and the limits of automation.

- Clarify oversight models to ensure compliance, accuracy and ethical safeguards.
- Explore how AI is reshaping roles - particularly in the back office.
- Debate the emerging risks and reputational issues in an AI-enhanced firm.

I4. Embedding tech without losing the human touch

As AI and automation become the norm, the competitive edge lies in how well you preserve empathy, judgement and service standards. This session will focus on people - your team, your culture and your clients - and most importantly how to keep humans at the centre of tech, by:

- Positioning AI internally as a co-pilot, not a threat - especially for paraplanners and ops teams.
- Reframing adviser roles and responsibilities to reflect new capabilities.
- Ensuring client experience remains relationship-led, even as efficiency improves.
- Identifying training priorities - from AI literacy to critical thinking and communication.
- Building a back-office culture of adaptability, curiosity and continuous learning.

Expert: Moneyinfo