owenjames

Meeting of Minds: Winning Advisers

Thursday 19 November 2026 – 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			
Tylney Suite	0920-1000	**Keynote**	**Lessons from decades of unbiased fund research and ratings.** With **Rory Maguire**, founder of headline sponsor, Fundhouse			
Breakout Rooms	1005-1115	**Roundtable Session**	*The future adviser - why judgement becomes the competitive advantage*	*What investment partners need to deliver - now more than ever*	*Partnership by design – how co-manufacturing is reshaping investment propositions*	*Retirement income under pressure - is traditional drawdown still fit for purpose?*
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**	*Rethinking organic growth - how do firms scale without simply adding more advisers?*	*AI in practice - from experimentation to everyday advice*	*The future investment proposition - building confidence beyond performance*	*Building teams that scale - attracting, developing and retaining future talent*
Oak Room Restaurant	1320-1420	**Lunch**	A seated formal lunch			
Tylney Suite	1430-1500	**Keynote**	**Navigating change for peak performance.** With **Dr Alison Edgar MBE**, UK business and motivational speaker			
Breakout Rooms	1505-1615	**Roundtable Session**	*Tax strategy after the reset – what planning looks like now*	*Beyond investments - building the modern wealth proposition*	*Investing when headlines no longer explain returns*	
Tylney Suite	1620-1650	**Keynote**	**The original productivity tool and overlooked 'secret' to a sustainable working life.** With **Nicole Ratcliffe,** The Workplace Sleep Coach			
Library Bar	1700-1800	**Farewell & Fizz**	We thank you for joining us over a glass of bubbly			

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Do call us on 01483 862 691 or email rebeccaleitch@owenjamesgroup.com.

a meeting of MINDS

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A MEETING OF MINDS WINNING ADVISERS

ROUNDTABLE THEMES

Thursday 19 November, Tylney Hall, Hook, Hampshire

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ROUNDTABLE THEMES TABLED FOR DISCUSSION

GEOPOLITICS & ECONOMICS

1. Tax strategy after the reset – what planning looks like now

Recent tax reforms have fundamentally changed retirement, estate and investment planning. Advisers are moving beyond reacting to fiscal announcements and redesigning long-term strategies around a new planning landscape.

This session will explore:

- How tax changes are reshaping retirement and estate planning
- New opportunities for family wealth planning
- Balancing gifting, pensions and investment strategies
- Helping clients navigate greater complexity with confidence

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- Building long-term value through proactive planning

2. Investing when headlines no longer explain returns

Traditional market relationships are becoming less predictable. Geopolitics, fiscal policy, AI-driven markets and concentrated equity returns are challenging conventional investment thinking and creating more difficult client conversations.

This session will explore:

- Why markets appear increasingly disconnected from economic news
- Managing concentration and geopolitical risk
- Helping clients stay invested during uncertainty
- Rethinking diversification for structural change

Expert: Sparrows Capital

YOUR BUSINESS

3. Rethinking organic growth – how do firms scale without simply adding more advisers?

Organic growth is becoming an organisational capability rather than simply the responsibility of individual advisers. The firms growing fastest are combining data, AI, marketing, leadership and operational discipline into repeatable commercial systems. This session will explore:

- Creating scalable growth engines rather than relying on individual rainmakers
- Increasing adviser capacity
- Removing low-value activity from adviser roles
- AI, automation and outsourcing
- Using data to improve commercial decision-making
- Marketing, referrals and lead conversion
- Measuring productivity and cost-to-serve
- Building growth cultures across the organisation

Expert: Unbiased

YOUR CLIENTS

4. Beyond investments – building the modern wealth proposition

Clients increasingly expect advisers to solve broader wealth challenges rather than simply manage investments.

Lending, protection, philanthropy, estate planning and specialist partnerships are becoming integral to a holistic wealth proposition. This session will explore:

- Expanding advice beyond investment management

- Integrating lending, protection, philanthropy and wider wealth planning into the client proposition
- Working effectively with specialist providers and strategic partners
- Building propositions around evolving client needs and life events
- Demonstrating value beyond investment performance alone
- Designing the future full-service wealth proposition

YOU & YOUR PEOPLE

5. The future adviser – why judgement becomes the competitive advantage

The qualities that clients value most are becoming distinctly human. The future adviser will be judged less by what they know and more by how they interpret complexity, build trust and help clients make better decisions, with the competitive advantage shifting from technical expertise alone to judgement, communication and behavioural leadership.

This session will explore:

- Why human judgement will become increasingly valuable as AI automates technical work
- Helping clients make better decisions through behavioural coaching rather than simply providing recommendations
- Building deeper, more trusted client relationships in an increasingly digital world
- Communicating complex financial planning with greater clarity, confidence and empathy
- Balancing technology with professional judgement and regulatory accountability
- How the adviser role will evolve over the next decade—and the skills firms should be developing today

6. Building teams that scale – attracting, developing and retaining future talent

The advice profession faces a significant workforce challenge with aging adviser populations, difficulty in recruiting and increasingly scarce talent. At the same time, AI, automation and changing client expectations are reshaping traditional career pathways and creating new opportunities to redesign advice teams.

The firms that succeed will be those that build more diverse, flexible and scalable organisations, developing people with the skills needed for the next generation of advice rather than simply replacing those who leave. This session will explore:

- Attracting and developing the next generation of advisers and financial planning professionals
- Creating sustainable career pathways across advice, paraplanning, client servicing and operations
- Building high-performing multidisciplinary teams that combine human expertise with AI-enabled capability
- Redesigning roles and responsibilities to improve productivity and adviser capacity
- Creating cultures that retain talent through purpose, development and leadership rather than remuneration alone
- Preparing today's workforce for the future operating model of financial advice
- How AI will reshape traditional roles, including paraplanning, operations and client servicing

TECHNOLOGY & INNOVATION

7. AI in practice – from experimentation to everyday advice

With AI rapidly moving beyond isolated pilots into everyday advice businesses, the challenge is no longer identifying where AI could add value, but embedding it safely and effectively across the business.

Firms are increasingly recognising that successful AI adoption depends as much on data quality, governance and operating models as the technology itself. This session will explore:

- Building the data foundations AI depends on
- Why governance and data quality determine AI success
- Embedding AI across the client journey rather than isolated use cases
- Creating operating models capable of supporting AI and Targeted Support
- Building governance, oversight and evidence into AI deployment
- Creating a practical roadmap for firm-wide adoption

Expert: Alison Hollingshead, Chief Technology Officer, Jupiter

PRODUCTS & PROPOSITION

8. Retirement income under pressure – is traditional drawdown still fit for purpose?

As more clients move from accumulating wealth to drawing an income from it, retirement planning is becoming one of the most important tests of the modern advice proposition. Market falls, longevity, inflation and sustained withdrawals create risks that are fundamentally different from those faced during accumulation - with implications not only for client outcomes, but for adviser revenues and the sustainability of the advice model itself.

The challenge is increasingly whether traditional drawdown approaches are sufficiently robust for a world in which clients may spend several decades in retirement. This session will explore:

- Managing sequencing risk when markets fall early in retirement
- Setting and reviewing sustainable withdrawal strategies
- Capacity for loss in practice – and whether current approaches are sufficiently robust
- Stress-testing retirement plans against market falls, inflation and longevity
- The role of downside-risk management, guaranteed income and blended retirement strategies
- What happens to both client outcomes and adviser revenues when falling markets coincide with ongoing withdrawals
- Evidencing sustainable retirement outcomes under Consumer Duty
- Whether the traditional drawdown model needs to evolve for longer, less predictable retirements

Expert: Schroders

9. Partnership by design – how co-manufacturing is reshaping investment propositions

As investment solutions become increasingly sophisticated, advisers are moving beyond traditional outsourcing towards deeper strategic partnerships.

Co-manufacturing is enabling firms to combine investment expertise with their own planning philosophy, creating more differentiated and scalable client propositions. This session will explore:

- The evolution from outsourcing to co-manufacturing
- Building stronger adviser–investment partnerships
- Where technology enhances collaboration and governance
- Balancing customisation with operational efficiency
- Delivering differentiated client outcomes through strategic partnerships

Expert: Isio

10. What investment partners need to deliver – now more than ever

The industrialisation of the MPS market has improved efficiency and accessibility, but it has also created greater homogeneity across investment propositions. As providers compete on cost and performance, advisers are increasingly looking for differentiation through the quality, consistency and reliability of investment returns and support they receive.

With advisers retaining responsibility for delivering good client outcomes, investment partners must offer more than competitive returns and cost efficiency. Consistency and predictability of returns, transparency and clear communication are becoming essential to building confidence, supporting client relationships, and delivering a consistent investment experience.

This session will explore:

- What consistency and predictability mean in practice, from investment processes and portfolio management to service standards and reporting.
- Why clear, timely and transparent communication is increasingly important, particularly during periods of market uncertainty.
- How investment providers can better support advisers in managing client expectations and delivering consistent outcomes.
- Where investment partners can differentiate beyond cost and performance in an increasingly competitive MPS market.
- How technology can improve reporting, transparency, communication and the overall adviser experience.
- How the relationship between advisers and investment partners needs to evolve to meet changing business and client expectations.

Expert: Pacific AM

11. The future investment proposition – building confidence beyond performance

Investment performance remains the foundation of every successful proposition, but it is no longer the primary differentiator. As investment solutions become increasingly accessible and client

expectations continue to evolve, advisers are looking beyond returns alone to create propositions that build trust, demonstrate value and deliver more consistent client outcomes.

The challenge is no longer simply selecting investments, but designing propositions that combine technology, behavioural coaching, governance and strategic partnerships into a compelling long-term client experience. This session will explore:

- How advisers can demonstrate investment value beyond short-term performance
- Balancing personalisation with scalable, consistent investment propositions
- The evolving role of MPS, DFMs, outsourced CIO and technology-enabled investment solutions
- Integrating behavioural coaching, communication and planning into the investment proposition
- Using technology and strategic partnerships to strengthen governance and improve client outcomes
- Future-proofing investment propositions for the next generation of clients

Expert: SEI