



Tuesday 29 September
Birmingham Repertory Theatre

THE FESTIVAL PROGRAMME

Keynotes, workshops, roundtables and more

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ZONE	08:30	09:00	09:15	10:00	10:45	11:30	12:00	12:15	13:00	13:45	14:30	15:15	16:00	17:00 – LATE
Main stage	Welcome Address		Opening keynote	Podium and keynote speakers covering the big ideas and key insights around organic growth geopolitical and macro-economic outlooks, regulatory direction and the forces shaping the future of finance			Podium and keynote speakers covering the big ideas and key insights around organic growth geopolitical and macro-economic outlooks, regulatory direction and the forces shaping the future of finance						Closing keynote	
The Academy	Arrival and registration			Workshop style presentations and interactive discussions, designed to provide the practical to take back to the office tomorrow.			Workshop style presentations and interactive discussions, designed to provide the practical to take back to the office tomorrow.						The ultimate festival finale for networking and fun. Drinks, live tunes and great company!	
Strategy Studio				Strategic roundtables focused on technical competence, regulatory and professional excellence, designed with peer-discussion and problem solving in mind.			Strategic roundtables focused on technical competence, regulatory and professional excellence, designed with peer-discussion and problem solving in mind:							
Innovation Zone				A fintech playground showcasing the latest tools, platforms and technologies and how they can solve problems and impacts growth, cost, valuation.			A fintech playground showcasing the latest tools, platforms and technologies and how they can solve problems and impacts growth, cost, valuation.							
Wellness Hub				Sleep as a performance lever	Getting stress under control	Guided sound bath	Longevity and health span	Focus and attention	Movement and mobility	Purpose beyond work	Nutrition for energy and clarity			
Performance Lab				Judgement, clarity and control	Building trust	The art of influence	Time management	Body language	Balancing speed, risk & judgement	Resilience	Empathy & active listening			
Innovation Zone Live				AI co-pilot for advisers (<i>live reports</i>)	Future client interfaces (<i>dashboard demos</i>)	Turning insight into action (<i>data visualisations</i>)	Retirement outcomes (<i>reality simulators</i>)	AI vs human advice (<i>live challenges</i>)	Digital reputation (<i>trust studio</i>)	Multi-asset under stress (<i>portfolios in motion</i>)	Build your future firm (<i>interactive strategy games</i>)			
Leaders' Lounge				A private lounge open all day for senior meetings, peer benchmarking and one-to-one conversations			A private lounge open all day for senior meetings, peer benchmarking and one-to-one conversations							
Networking Nook				Peer conversations and high-value connections: Intelligent matchmaking, introductions and senior discussions			Peer conversations and high-value connections: Intelligent matchmaking, introductions and senior discussions							
Meeting Mezzanine				Speed networking, quick introductions and one-to-one conversations			Speed networking, quick introductions and one-to-one conversations							
Wealth Way				The social and commercial heart of the Festival A high-energy hub where delegates, sponsors and partners connect, explore the stands, engage in conversations and discover new opportunities as you move through the space.			The social and commercial heart of the Festival A high-energy hub where delegates, sponsors and partners connect, explore the stands, engage in conversations and discover new opportunities as you move through the space.							

Please see below for more information about each of the zones and sessions. Timings are subject to change. Final schedule of the day will be available closer to the event day.



Festival of Finance

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The Rep, 6 Centenary Square, Birmingham on 29 September 2026

Growth in wealth management is no longer being driven by markets alone. As margins tighten, client expectations rise and technology reshapes the advice model, firms are facing a fundamental challenge:

How do you scale a business built on trust, relationships and personalisation - without losing what makes it valuable?

The industry today sits in a clear paradox. Demand for advice has never been higher, yet firms are increasingly constrained by regulation, rising costs and adviser capacity. At the same time, the traditional, relationship-led model that underpins trust is often the very thing that limits scalability.

Firms are now being forced to evolve - from trusted, artisanal advice businesses to more efficient, technology-enabled and growth-focused organisations. The winners will be those that can combine human trust with operational efficiency, retaining the quality of advice while building more scalable, modern delivery models.

The Festival of Finance brings CEOs, advisers and industry leaders together to explore this tension and, critically, how to resolve it. Across keynotes, workshops and roundtables the agenda will focus on the strategies, capabilities and decisions that will define the next phase of growth.

About this agenda

This agenda showcases the keynotes, workshops, roundtables, soft skills, innovation and wellness sessions that you can select, depending on your priorities throughout the day.

The day is structured across a range of formats and experiences in the following dedicated spaces - each designed to help you move from insight to action:

Zone index	Page
The Main Stage brings everyone together around the big questions shaping the future of the industry - from growth and client demand to regulation, markets and the advice model itself	2
The Academy delivers practical, workshop-led sessions focused on implementation - helping firms translate strategy into action	4
The Strategy Studio hosts peer-led roundtables designed for deeper discussion, shared challenges and real-world problem-solving	6
The Innovation Zone is a fintech playground showcasing the tools, platforms and technologies shaping the next generation of advice - and how they impact growth, cost and client outcomes	18
The Performance Lab focuses on the leadership capabilities required to perform under pressure - from communication and decision-making to influence and effectiveness	20
The Wellness Hub provides space to reset, reflect and sustain performance - recognising that long-term effectiveness depends on both capability and wellbeing	22



Main Stage

Podium speakers and sponsored keynotes covering the big ideas and key insights around organic growth geopolitical and macro-economic outlooks, regulatory direction and the forces shaping the future of finance:

1. Investing for outcomes, longevity and wellbeing

As clients live longer, retirement is no longer just a financial challenge, but a wellbeing one. This keynote will explore:

- How multi-asset strategies support long-term income and resilience
- The link between financial security and wellbeing outcomes
- How advisers can evolve conversations beyond performance
- How longevity is reshaping portfolio design

2. The data behind the next decade of growth

Growth depends on understanding clients, but most firms rely on assumptions rather than evidence. This keynote will explore what the data really says about growth and where firms are getting it wrong, including:

- What client behaviour data is really showing
- How expectations are shifting across segments
- Where firms are misaligned with client needs
- How data can inform growth strategy

3. Managing through structural uncertainty

Leading through structural uncertainty and managing investment at an unmanageable time relies on resilience vs prediction. This keynote will explore the geopolitical landscape in order to balance:

- Long-term thinking with short-term decision-making
- Resilience vs prediction

4. Trust, visibility and growth in a digital-first world

Organic growth increasingly depends on trust, reputation and visibility. This keynote will explore trust at scale and how visibility, reputation and growth now intersect, including:



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- How clients choose advisers today
- The role of reviews, reputation and digital presence
- How firms convert trust into growth
- What differentiates high-growth firms

5. Can advice scale without losing what makes it valuable?

The advice industry is built on trust, relationships and personalisation yet firms are under increasing pressure to scale, reduce costs and modernise delivery. This session will explore:

- Whether the traditional advice model is structurally scalable
- Where growth is constrained by cost-to-serve and adviser capacity
- What happens to trust and client outcomes as firms scale
- How leading firms are balancing efficiency with personalisation
- Whether the future is evolution - or a fundamentally different model

6. The Advice Model: Fit for the future - or under threat?

The demand for advice has never been higher yet the model used to deliver it is under increasing strain. Rising costs, regulatory pressure, talent constraints and changing client expectations are all testing whether the traditional, relationship-led approach can scale in its current form.

This closing session will step back from individual themes and ask a more fundamental question - is the advice model evolving or being structurally challenged? by asking:

- Whether the traditional advice model is economically and operationally sustainable in its current form
- What is most likely to break under pressure - cost-to-serve, talent availability or client demand
- How technology, AI and new delivery models are reshaping how advice is delivered and consumed
- Whether firms can scale without compromising trust, quality and personalisation
- What the next generation advice firm looks like - in terms of structure, proposition and client engagement



The Academy

Workshop style presentations and interactive discussions, designed to provide the practical to take back to the office tomorrow.

1. Building a repeatable organic growth engine

Many firms talk about growth, few have a system for delivering it consistently. This workshop will explore:

- How to map and measure growth across the client lifecycle
- How to increase aum per client and per adviser
- How to embed accountability for growth across teams
- How to move from opportunistic to repeatable growth

2. A retirement proposition that works in practice

Retirement propositions often look strong on paper but break down in delivery. This workshop will explore:

- How to design retirement propositions across accumulation, decumulation and later life
- How to integrate income, tax and client behaviour
- How to balance certainty, flexibility and growth
- How to simplify without losing robustness

3. AI for now, not three years' time

What you should be using today and tomorrow by exploring:

- Real use cases advisers can implement immediately
- How to integrate ai into workflows without disruption
- Where ai genuinely saves time vs creates noise
- How to use ai safely within a regulated environment

4. What does 'good' really look like under Consumer Duty?



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Consumer Duty has set a higher bar, but many firms still struggle to translate principles into consistent, measurable outcomes. This workshop will explore:

- How firms should evidence good outcomes across different client segments
- Where firms are falling short in practice (and why)
- How to align product, pricing and service with consumer duty expectations
- What “good” looks like from a supervisory perspective



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Strategy Studio

Strategic roundtables focused on technical competence, regulatory and professional excellence, designed with peer-discussion and problem solving in mind:

Roundtables:

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GEOPOLITICS & ECONOMICS

I. Where will organic growth come from in a slower world?

Growth is no longer being driven by markets alone. As macro conditions become less supportive, firms must rethink how they generate sustainable, controllable growth. This session will explore:

- How reduced market beta is exposing the reality of underlying growth
- Which client segments and behaviours are driving organic flows
- How geopolitics and fiscal pressure are shaping client decisions
- Whether firms are structurally over-reliant on market performance



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2. Positioning portfolios for a fragmenting world order

This session will explore:

- How geopolitics is reshaping asset allocation decisions
- Whether global diversification still works in practice
- How advisers communicate uncertainty without paralysis

3. The end of easy returns

What happens when markets don't bail you out? This session will explore:

- What low-beta environments mean for advice firms
- How firms replace market-driven growth with controllable growth
- Implications for client expectations and pricing

REGULATORY CHANGE

4. Consumer Duty and growth

Consumer Duty is often seen as a cost, but it may also be the biggest lever for organic growth if approached correctly. This session will explore:

- Whether firms are using Consumer Duty to differentiate or simply comply
- How transparency, value and segmentation can drive growth
- Where firms risk missing growth by over-engineering compliance
- What “good growth” looks like under regulatory scrutiny

5. Targeted support and simplified advice

Real opportunity or false promise? This session will explore:

- Whether simplified advice is commercially viable
- Who is best placed to win this space
- How firms avoid building propositions that don't scale



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6. What do the new FCA proposals really mean?

The FCA's proposals to simplify pensions and investment advice rules could reshape how firms deliver and evidence advice. While intended to improve access and reduce burden, the implications for operating models, risk and client outcomes remain unclear. This session will explore:

- What the proposed changes mean in practice for advice firms
- Whether simplification genuinely reduces cost or shifts risk elsewhere
- How firms should respond to evolving expectations around servicing and suitability
- What this means for growth, segmentation and client engagement

YOUR BUSINESS

7. The advice firm of 2030

What must change now? This session will explore:

- What the future firm looks like
- Which capabilities will define winners
- What leaders need to prioritise today

8. What is working in organic growth - and what isn't?

With M&A slowing and valuations shifting, firms are under pressure to deliver growth from within. This session will explore:

- Which growth levers are genuinely delivering (referrals, pricing, segmentation, proposition)
- How leading firms are increasing aum per adviser
- Where growth is being lost across the client lifecycle
- How firms are creating accountability for growth internally

9. Do you know where your growth is coming from?

Many firms talk about growth, but few can clearly track it. This session will explore:

- How firms can track growth across onboarding, retention and share of wallet
- Where growth responsibility should sit within the business
- How data is (or isn't) being used to drive growth decisions
- How to move from anecdotal to measurable growth strategy



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10. Inorganic Growth: Building value or just scale?

As consolidation continues, firms face increasing pressure to grow through acquisition. But not all growth creates value, and many firms underestimate the operational, cultural and client risks involved. This session will explore:

- How to assess whether a firm is genuinely ready for acquisition or sale
- What drives valuation in the current market and how firms can influence it
- Where integration most commonly destroys value post-deal
- How firms balance inorganic and organic growth strategies

11. Pricing for growth

Are firms charging the right clients the right way? This session will explore:

- Whether pricing reflects actual delivery and value
- Where firms are under or over-charging
- How pricing strategy links to growth and segmentation

12. Scaling without breaking

What happens when growth actually arrives? This session will explore:

- Where operating models fail under growth pressure
- How firms maintain service quality at scale
- What breaks first: people, tech or process

13. Partnerships that drive growth

As competition for clients intensifies, partnerships are becoming an increasingly important route to growth. From professional introducers to brand and lifestyle collaborations, firms are exploring new ways to access and engage clients - but results vary widely. This session will discuss:

- Which partnership models are delivering consistent, high-quality client referrals
- How firms structure relationships with lawyers, accountants and other professional networks
- Whether non-traditional partnerships (e.g. luxury, lifestyle) are commercially effective or distracting
- What differentiates partnerships that scale from those that fail
- How firms measure the true value of partnerships beyond anecdotal success



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YOUR CLIENTS

14. The new IHT landscape: Beyond business relief

As IHT planning becomes more central to client conversations, advisers are increasingly balancing Business Relief with broader strategies including gifting, trusts and income planning. The challenge is no longer just tax mitigation, but aligning planning with client lifestyle, control and long-term security.

- How advisers are balancing Business Relief with gifting and cashflow-led planning
- The emerging concept of 'capacity to gift' and its role in client conversations
- How clients are weighing income security vs estate planning
- Where firms are evolving their approach to intergenerational planning
- What clients actually value when discussing legacy and wealth transfer

Expert: Puma Investments

15. What has changed when it comes to winning new clients

Client acquisition is becoming harder, slower and more competitive. This session will explore:

- How client expectations and behaviours are evolving
- Which acquisition channels are genuinely working today
- How trust, brand and digital presence influence conversion
- Whether firms are targeting the right client segments

16. Deepening existing client relationships

The biggest growth opportunity may already sit within existing clients. This session will explore:

- How firms increase share of wallet and client lifetime value
- Why intergenerational engagement is still underdelivered
- How client segmentation can unlock new revenue
- What drives loyalty and retention in a more competitive market

17. The behavioural growth gap

Firms often assume growth is about supply, but is behaviour the real constraint? This session will explore:



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- Why clients delay decisions even when value is clear
- How fear, uncertainty and inertia limit growth
- How firms can design journeys that drive action
- How better conversations unlock revenue

18. The next generation client

Are firms ready for them? This session will explore:

- How expectations differ across generations
- What younger clients actually value (and reject)
- Whether firms are designing for future or legacy clients

19. Trust in advice

What actually drives client decisions today? This session will explore:

- How trust is built, lost and transferred
- The role of brand, reviews and referrals
- How trust translates into growth

20. Client communication in volatile markets

What actually works? This session will explore:

- How firms keep clients invested through uncertainty
- What messaging drives confidence vs fear
- How communication impacts retention and inflows

21. The Spectrum of capital in client conversations

Client expectations are evolving beyond traditional investment returns, with increasing interest in philanthropy, impact and values-led allocation. For firms, this creates both an opportunity to deepen relationships and a challenge in navigating complexity, suitability and credibility. This session will explore:

- How leading firms are structuring conversations across philanthropy, impact and traditional investing
- Where values-based discussions are genuinely driving deeper client engagement and share of wallet



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- How firms balance commercial outcomes with purpose-led advice
- What 'good' looks like in integrating the full spectrum of capital into client strategies
- Whether this is a differentiator - or becoming a baseline expectation

YOU & YOUR PEOPLE

22. Can firms grow without hiring?

Growth is often constrained by adviser capacity rather than demand. This session will explore:

- How firms are increasing adviser productivity and capacity
- What the optimal adviser-to-client model looks like
- How roles are evolving (paraplanners, AI, support)
- Whether firms are structurally inefficient

23. Are we building for growth or replacing it?

How talent strategy is becoming a growth strategy. This session will explore:

- Whether current adviser models are scalable
- How ai changes the role of advisers and junior talent
- How firms build pipelines that support long-term growth
- Where firms are over- or under-investing in people

24. Leadership in a changing industry

What needs to be done differently? This session will explore:

- How leadership roles are evolving
- Where firms are underestimating change
- How to lead transformation without losing the business

25. Culture as a growth driver

Is this myth or reality? This session will explore:

- Whether culture genuinely impacts performance
- How culture shows up in client outcomes
- What "high-performing" firms do differently



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26. The partnership model

Is it still fit for purpose? This session will explore:

- Whether traditional ownership models still work
- How equity, incentives and succession are evolving
- Implications for attracting and retaining talent

TECHNOLOGY

27. Where is the real value with AI and organic growth

AI is widely discussed, but its link to growth is still unclear.

This session will explore:

- Where AI is genuinely driving revenue, not just efficiency
- How AI can support client acquisition and engagement
- Whether firms are redesigning workflows or layering tools
- What separates scalable AI adoption from experimentation

28. Winning the data game

Data is becoming the key determinant of growth and valuation.

This session will explore:

- How data ownership links to client ownership and revenue
- Where firms are losing control across platforms and providers
- How data fragmentation limits growth and personalisation
- What CEOs should prioritise to build data advantage

29. The future of the advice tech stack

Build, buy or blend? This session will explore:

- Whether best-of-breed still works
- When integration becomes a liability
- How firms avoid tech sprawl



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30. Cyber resilience is still underestimated

As advice firms become more digital and interconnected, cyber risk is shifting from an IT issue to a board-level concern. Yet many firms remain underprepared for both the financial and reputational impact of a breach. This session will explore:

- Where firms are most exposed across platforms, providers and internal systems
- How cyber risk is evolving with AI, outsourcing and data fragmentation
- What 'good' looks like in cyber resilience for advice firms
- How leaders should balance protection, cost and operational complexity

31. Data to decision

Why insight still isn't driving action. This session will explore:

- Why firms struggle to operationalise data
- What good looks like in data-led decision making
- How to link data to growth outcomes

32. The client experience gap

Why other industries are winning. This session will explore:

- How client expectations are being reset outside finance
- Where advice firms are falling behind
- What 'good' digital experience actually looks like

PRODUCTS & PROPOSITION

33. Business relief in practice

Business Relief remains a key tool in IHT planning, but increasing scrutiny, product evolution and suitability considerations are making its application more complex. Advisers must balance tax efficiency with risk, liquidity and client understanding. This session will explore:

- How Business Relief solutions are evolving across listed and private market structures
- Where suitability and risk are most often misunderstood or miscommunicated
- What 'good' looks like in due diligence, client positioning and ongoing monitoring
- How firms balance tax efficiency with liquidity, volatility and client outcomes



- Where regulatory and reputational risks are increasing

Expert: Puma Investments

34. Tokenisation & Liquidity: Structural shift or overstated opportunity?

Tokenisation is moving from concept to application, with potential implications for liquidity, cost efficiency and access to private markets. Yet for many firms, the commercial case and client relevance remain unclear. This session will explore:

- Where tokenisation is delivering real-world impact today and where it is not
- Whether tokenised infrastructure can materially improve liquidity in private and semi-liquid assets
- How tokenisation could reshape cost, custody and settlement across wealth platforms
- What advisers need to understand before introducing tokenised solutions to clients
- Whether tokenisation represents a structural shift - or simply another layer of complexity

35. Are Centralised Propositions a growth enabler or constraint?

CIPs and MPS models have driven scale, but are they now limiting growth?

This session will explore:

- Whether centralisation supports or restricts client outcomes
- How firms balance scalability with flexibility
- Where propositions are becoming commoditised
- What differentiation looks like in a scaled model

36. What clients actually value now

Growth increasingly depends on how clearly firms articulate value.

This session will explore:

- How client value is shifting from investment to planning
- Whether pricing reflects delivery and outcomes
- How simplification can drive both growth and trust
- What 'compelling' looks like in modern propositions



37. Alternatives in practice

Are advisers using them effectively? This session will explore:

- Where alternatives genuinely add value
- Barriers to adoption
- How to position them with clients

38. Retirement income solutions

Product innovation or complexity? This session will explore:

- Whether innovation is improving outcomes
- How advisers navigate product proliferation
- What 'good' retirement solutions look like today

39. Tax, reliefs and policy risk

Tax and business reliefs remain central to client outcomes, yet increasing scrutiny and potential policy reform are creating uncertainty. Advisers must balance opportunity with suitability and communication risk. This session will explore:

- Where policy and regulatory scrutiny is increasing
- How firms are adapting tax-led strategies in practice
- What 'good' looks like in suitability and communication
- How to position tax advice without creating client anxiety

40. Simplification vs Customisation

What do clients actually want? This session will explore:

- Whether simpler propositions drive better outcomes
- Where customisation still matters
- How firms balance both

41. The next phase of sustainable investing

This session will explore whether ESG is evolving or fading, by asking:

- How client demand is shifting and what the next iteration looks like



Innovation Zone

A fintech playground showcasing the latest tools, platforms and technologies and how they can solve problems and impacts growth, cost, valuation:

1. AI co-pilot for advisers (live reports)

- Generate suitability reports in seconds
- Live client meeting simulation
- Show real workflow transformation

2. The future client interface (dashboard demos)

- Explore next-gen client dashboards
- Personalised insights, nudges, real-time data
- Compare 'today vs future' experience

3. Turning insight into action (data visualisations)

- Interactive dashboards
- Explore segmentation, behaviour, growth
- 'find your growth opportunity' demo

4. Retirement outcomes (reality simulators)

- Simulate income, longevity, market shocks
- Show impact of decisions in real time
- Helps advisers 'feel' client outcomes

5. AI vs human advice (live challenges)

- AI builds a plan vs human adviser
- Audience votes
- Sparks discussion on value of advice

6. Digital reputation (trust studio)



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- Live review profiles
- What clients see before choosing an adviser
- Optimise your digital presence in real time

7. Multi-asset under stress (portfolios in motion)

- Interactive market scenarios
- See how portfolios react to shocks
- Link to real-world client conversations

8. Build your future advice firm (interactive strategy games)

- Gamified experiences covering:
 - tech stacks
 - propositions
 - pricing models



Performance Lab

A focus on the leadership capabilities that underpin better decisions, stronger communication and more effective performance in high-stakes environments:

1. Judgment, clarity and control when it matters most

Senior leaders are not short of visibility, they are operating under increasing scrutiny. In high-stakes environments, communication is judged by consequence, not intent, and even small missteps can have a disproportionate impact on clients, colleagues and business outcomes. This interactive workshop will cover:

- Real-world communication scenarios to understand how messages are interpreted under pressure
- Practical frameworks to decide what to say, when to say it, and what to hold back
- The different communication approaches that can strengthen or undermine outcomes
- Where over-communication or under-communication creates risk
- How emotional intelligence supports clarity, timing and control in high-stakes situations
- Practical, transferable approaches to communication under pressure

Expert: We Are Jago

2. Building trust with consistency and credibility

Senior leaders understand that trust underpins every client relationship and business decision - but maintaining it consistently across teams, clients and stakeholders is increasingly complex. This session will explore how trust is built, reinforced and, critically, lost:

- Understand what drives trust in leadership and advice relationships
- Explore how consistency of behaviour impacts credibility
- Identify where trust is most at risk across the business
- Assess how firms measure and evidence trust in practice
- Share approaches to building long-term, resilient trust

3. Influencing without authority to drive change

In increasingly complex and matrixed organisations, senior leaders must influence outcomes without direct control. Whether driving transformation, embedding new strategies or aligning stakeholders, influence has become a critical leadership capability.



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- Explore how leaders influence across functions, teams and stakeholders
- Identify where influence breaks down in complex organisations
- Understand how to align competing priorities and agendas
- Assess the role of credibility, relationships and timing
- Share practical approaches to driving change without formal authority

4. Balancing speed, risk and judgment at a time of uncertainty

Leaders are making decisions in environments defined by uncertainty, incomplete information and increasing pressure. The challenge is not just making decisions, but making better ones - consistently and at pace.

- Explore how leaders approach decision-making under uncertainty
- Identify where bias, pressure and incomplete data impact outcomes
- Assess how firms balance speed with risk and control
- Understand how leading organisations structure decision-making
- Share approaches to improving consistency and quality of decisions

5. Focus, prioritisation and performance

As roles expand and complexity increases, senior leaders face constant demands on their time, attention and energy. Personal effectiveness is no longer about efficiency alone, but about maintaining clarity and focus in high-pressure environments.

- Explore how leaders prioritise in complex and fast-moving environments
- Identify where time and attention are most frequently lost
- Assess how leaders maintain focus under pressure
- Understand how high-performing leaders structure their time and energy
- Share practical approaches to sustaining performance over time



Wellness Hub

A dedicated space for wellbeing and personal growth:

1. Sleep as a performance lever

Discover why rest drives better decisions:

- Understand how sleep impacts cognitive performance and decision-making
- Identify small changes to improve sleep quality immediately
- Practical tools for managing sleep in high-pressure roles

2. Getting stress under control

The tools for high-pressure environments:

- Recognising stress signals before burnout
- Breathing and reset techniques (live practice)
- Managing client-driven pressure and uncertainty

3. Guided sound bath

Reset your nervous system:

- Immersive sound-led relaxation
- Designed to reduce stress and improve focus
- A true 'pause' in the day

4. Longevity and healthspan

Plan a 30-year retirement:

- What actually drives long-term health
- How lifestyle choices impact longevity
- Parallels between client advice and personal wellbeing



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5. Focus and attention

How to reclaiming productivity in a distracted world:

- How attention is being eroded
- Techniques to improve deep work and focus
- Managing digital overload

6. Movement and mobility

How to make deskwork more dynamic:

- Simple mobility routines
- Posture and injury prevention
- Energy management through movement

7. Purpose beyond work

Planning for the great exit:

- Identity and purpose in later life
- Parallels with client retirement journeys
- How advisers think about their own future

8. Nutrition for energy and clarity

How diet impacts energy and cognition:

- Simple changes for sustained performance
- Avoiding energy crashes during the workday