

A Meeting of Minds Scotland

Tuesday 11 November 2025 - DoubleTree by Hilton, Perth Rd, Dunblane FK15 0HG

1900-2200	Networking Drinks and Dinner	Seated for dinner at 19:45
Schedule of the Day		
0830-0900	Coffee and pastries	Informal networking over coffee
0900-0920	Keynote	Welcome - incorporating the highlights of the Scene Setter research. With James Goad , Managing Director, Owen James Events
0920-1000	Keynote	Expert insights on the geopolitical and economic landscape
1005-1115	Roundtable Session	<i>Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables</i>
1115-1135	Morning Coffee	Grab a refreshment and catch up with your peers
1135-1210	Networking	Structured networking - an opportunity to meet some new faces
1215-1325	Roundtable Session	<i>Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables</i>
1330-1430	Lunch	A seated formal lunch
1435-1505	Keynote	A focus on productivity, performance and wellness
1510-1620	Roundtable Session	<i>Please refer below to get a feel for the topics that will be tabled for discussion within the roundtables</i>
1625-1655	Keynote	Disruptive thinking to challenge the status quo
1655-1800	Fizz and Farewell	We thank you for joining us and bid you farewell

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ROUNDTABLE THEMES

Tuesday 11 November, Doubletree by Hilton Dunblane Hydro Hotel

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ROUNDTABLE THEMES TABLED FOR DISCUSSION

GEOPOLITICS & THE ECONOMY

1. Geopolitical shocks and portfolio resilience

How are advisers recalibrating investment strategies in response to shifting global alliances, elections, and economic fractures?

2. Fiscal Reset: What a Labour budget means for Scottish wealth firms

An exploration of tax planning, pensions, and IHT in a shifting fiscal policy environment.

3. Wealth & Trade: Scotland's role in the UK's economic future

How changes to UK-wide economic policy, trade deals, and tax structures will influence regional wealth creation and retention.

REGULATORY CHANGE

4. Regulatory Strategy: Aligning compliance with business growth

Transforming Consumer Duty from a cost centre into a competitive advantage.

5. Navigating the FCA's Advice Boundary Review

Clarifying the future of simplified and guided advice and the implications for regulated businesses.

6. Cost of Compliance: Is proportionality possible?

Strategies for managing regulatory cost inflation and retaining agility under increasing oversight.

YOUR BUSINESS

7. Organic Growth vs Acquisition: Choosing the right path for scale

When should Scottish firms double down on referrals and brand - and when to look to buy?

8. Delivering productivity without burnout

Enhancing adviser 'golden time' and rethinking how success is measured post-Consolidation.

9. Mastering the art of integration

Lessons from recent M&A activity in UK wealth management - how to avoid cultural drift and value leakage.

YOUR CLIENTS

10. Intergenerational planning with a Scottish lens

How to prepare clients for succession, IHT and gifting amid differing attitudes north of the border.

11. High-Touch or High-Tech? Redefining client engagement post-pandemic

Striking the right balance for complex clients in a digital-first world.

12. What your clients really value in a relationship-driven business

Exploring trust, longevity and perceived value beyond portfolio performance.

PRODUCTS & PROPOSITION

13. Private markets & alternative assets in HNW portfolios

What's next for access, transparency and suitability in a rising private capital environment?

14. Rethinking retirement planning in a lower-yield world

Balancing guarantees, drawdown flexibility and long-term sustainability in client portfolios.

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15. The Future of CIPs: Tax traps and structural drift

Identifying hidden risks in centralised investment propositions as market dynamics evolve.

TECHNOLOGY & INNOVATION

16. AI in Action: From theory to tangible ROI

Real-world examples of how Scottish firms are using AI to drive productivity and personalisation.

17. The Adviser-Controlled Platform: Game-changer or governance headache?

Exploring oversight, risk and opportunity in vertically-integrated platform models.

18. Integration, Automation and Efficiency: Building a scalable tech stack

Avoiding tech sprawl and getting to one version of the truth - from onboarding to annual review.

YOU & YOUR PEOPLE

19. Retention Under Pressure: Protecting culture in a changing industry

What senior leaders can do to hold onto top talent as costs rise and models evolve.

20. Next-Gen adviser strategy

How to engage, train and retain a new breed of adviser and reshape the adviser/client dynamic.

21. The human side of leadership: decision-making in uncertain times

How senior leaders can build clarity, culture and conviction amid change.