



Festival of Finance

**THE MUST-ATTEND, FLAGSHIP
EVENT FOR FINANCIAL ADVICE
AND WEALTH MANAGEMENT
WHERE INSIGHTS MEET INFLUENCE**

Tuesday 29 September 2026
Birmingham Repertory Theatre
6 Centenary Square, Birmingham B1 2EP

Powered by  **owenjames**

INSIGHT. INNOVATION. CONNECTION.

The Festival of Finance blends learning, strategy, innovation, wellbeing and fun into one high-energy festival designed to empower advisers and wealth managers gain insights, make valuable connections and shape the future together.

The Festival of Finance marks the launch of a bold, new flagship event for the UK financial advice and wealth management profession. It is designed to scale rapidly, becoming the must-attend annual event for the sector. Our vision is to build momentum and set the stage for significant expansion to 2,500+ delegates in 2027.

The UK's leading festival shaping the future of financial advice and wealth management

In September we are bringing together **500 senior** advisers, planners and wealth managers for a day of:

- ▶ unrivalled insights
- ▶ CPD learning
- ▶ strategic dialogue
- ▶ peer-to-peer collaboration
- ▶ meaningful commercial engagement

For the first time ever, the Fintel group (the powerhouse behind Defaqto, Owen James, SimplyBiz, threesixty, VouchedFor and more) are hosting the largest industry event, giving you unrivalled access to the adviser and wealth audience.



There has never been a more exciting time to bring financial advisers and wealth managers together. This is not just another conference, it is a festival of insights, fresh perspectives, and hands-on learning. I look forward to welcoming you as partners, as together, we are re-envisioning the future.

James Goad, Managing Director of Owen James Events



WHO WILL BE THERE?

The full UK advice and wealth management ecosystem

Join **senior advisers, wealth managers and industry leaders** - with representation spanning independent firms, national and regional practices, consolidators, platforms, product providers, technology partners and regulators.



Attendees will include:

- ▶ **Independent Financial Advisers (IFAs)**
Firm owners, principals and senior advisers
- ▶ **Wealth Managers & Investment Professionals**
From boutique firms to larger discretionary and hybrid models
- ▶ **Advice & Wealth Firm Leadership**
CEOs, COOs, Heads of Advice, Investment, Operations, Compliance and Growth
- ▶ **Platforms, Providers & Product Specialists**
Investment, retirement, protection, platform and proposition leaders
- ▶ **Technology & Innovation Partners**
Advice tech, AI, data, CX and digital enablement specialists
- ▶ **Regulatory & Industry Voices**
Contributing insight, perspective and market context
- ▶ **Future Leaders & Rising Talent**
Connecting today's decision-makers with tomorrow's leaders



HOW WILL IT WORK?

This one-day, flagship industry gathering is designed not just for insight and visibility, but for high-quality, relevant connections at scale.

Areas of focus

01

THE STRATEGY STAGE

Where the industry aligns on what's next.

Exploring macro-economic outlooks, regulatory direction and the forces shaping the future of finance, powered by Fintel Group's unrivalled data and insight.

Why it matters for sponsors

Visibility at the centre of the industry's biggest conversations and association with agenda setting insight.

02

THE ACADEMY (CPD)

Learning that builds trust and credibility.

A CPD-accredited learning hub focused on technical competence, regulatory confidence and professional excellence.

Why it matters for sponsors

Workshops and learning-led engagement position sponsors as trusted partners, not just providers.

03

THE INNOVATION LAB

Hands-on discovery that drives meaningful conversations.

A fintech playground showcasing the tools, platforms and technologies shaping advice and wealth in 2026 and beyond.

Why it matters for sponsors

Live demos and hands-on experiences create natural, high-intent engagement.

04

THE WELLNESS PAVILION

Supporting sustainable performance.

A dedicated space for wellbeing, coaching and personal growth, reinforcing long-term thinking and human connection.

Why it matters for sponsors

Association with values-led leadership and the whole-professional agenda.

05

THE WEALTH VILLAGE

The social and commercial heart of the festival.

The Wealth Village is where conversations happen, combining exhibition, networking and informal meeting spaces into one high-energy hub.

Why it matters for sponsors

High dwell time, repeat interactions, and sustained visibility throughout the day.

INTELLIGENT NETWORKING, POWERED BY FINTEL DATA.

Calculated connections, creating maximum impact.

Powered by Fintel's unrivalled data and market intelligence, the festival goes beyond traditional networking to deliver intelligent matchmaking. This ensures the sponsors and delegates are intelligently matched based on:

- Firm type and size
- Business model and growth priorities
- Product and technology needs
- Strategic interests and challenges

This enables:

- Pre-scheduled 1-2-1 meetings with high-relevance prospects
- Curated roundtables and peer groups
- Targeted introductions within zones
- Smarter use of delegate time

For sponsors, this means fewer, better conversations with people who are genuinely relevant.

Networking built in, not left to chance

In addition to data-led matchmaking, the festival design actively encourages connection through:

- Speed networking and facilitated introductions
- Give-get boards and topic-based meet-ups
- Lounge spaces and café conversations
- Interactive networking experiences throughout the day

The result is an environment where networking feels natural, efficient and valuable — not forced or transactional.

One day. The right people. Real conversations.

The Festival of Finance combines insight, innovation and intelligent networking into a single flagship event — giving sponsors unrivalled access to the advisers and wealth managers shaping the future of the industry.

Designed for engagement, from start to finish

Delegates shape their own journey across the festival, while sponsors benefit from:

- Multiple engagement touchpoints
- Repeated interactions across zones
- Stronger recall through sustained presence

The festival atmosphere — with live entertainment, food zones and an end-of-day celebration — keeps people on site longer, increasing opportunities for meaningful engagement.

WHAT SETS THE FESTIVAL OF FINANCE APART?

01 Unrivalled insight, powered by Fintel

The Festival of Finance harnesses data and insight from across the Fintel group, including market intelligence, adviser behaviour, product usage and sentiment, to surface the trends that matter most.

This insight is embedded throughout the Festival via:

- Strategy-stage briefings and keynotes
- Data-led content and benchmarking
- Live polling and on-site insight capture
- Post-event intelligence and reporting

Evidence-led, not just opinion-led insight

For sponsors, this means:

- Clearer signals on market direction
- Better understanding of adviser needs and priorities
- Intelligence that informs strategy, product development and go-to-market plans

02 Data-led networking

Fintel's unrivalled market data enables intelligent matchmaking between sponsors and delegates based on firm profile, priorities and needs – turning networking from chance into strategy.

Fewer introductions. Better outcomes.

03 A true 'big tent' industry gathering

The Festival brings together advisers, wealth managers, platforms, providers, innovators and regulators in one place, creating cross-industry conversations that don't happen elsewhere.

04 A festival experience, not a conference

Multi-zone design, freedom of movement, live entertainment and social energy create a relaxed environment where people stay longer, engage more and connect more naturally.

05 Multiple engagement, one event

Sponsors connect with delegates across the entire day – on stages, in workshops, in the Innovation Lab, through 1-2-1s and informal conversations – not just at a stand.

06 Backed by the industry's convener – a trusted partner

Powered by Fintel, with deep relationships and c.80% market penetration, The Festival of Finance benefits from trusted reach, insight and credibility across the entire advice and wealth ecosystem.

Owen James Events have also been a trusted partner in the industry bringing together key influencers through flagship events such as 'A Meeting of Minds' and delivering 'wow experiences' for the industry for over two decades.

IN SHORT

The Festival of Finance offers sponsors:

- Better-matched conversations
- Deeper engagement
- Stronger brand association
- Measurable commercial opportunity

All within the UK's flagship festival for the future of wealth and advice.

SPONSORSHIP PACKAGES

Partnership structures are designed to deliver measurable ROI and long-term brand equity.

Package	Cost (ex VAT)	What's included	Best for
Headline Partner	£60,000	<ul style="list-style-type: none"> • Category exclusivity • Prominent branding across the festival • Keynote or plenary presence on the Strategy Stage • Premium stand in the Wealth Village • Hosted roundtable or workshop • Priority data-led matchmaking & pre-scheduled 1-2-1s • Post-event insight report & delegate intelligence • Full access to Innovation Lab activations 	Brands seeking maximum visibility, influence and insight
Content Partner	£21,000	<ul style="list-style-type: none"> • Thought leadership session (panel or workshop) • Branded content placement • Stand in the Wealth Village • Inclusion in data-led matchmaking programme • Access to post-event insight summary 	Firms looking to demonstrate expertise and build trust
Hosted Roundtables	£17,750	Curated, peer-level discussion with matched delegates under Chatham House rules	Sponsors seeking deep, senior-level conversations
Innovation Lab Activation	£10,000	<ul style="list-style-type: none"> • Bespoke, hands-on or experiential activation (AI use-case, immersive demo, future adviser journey, etc.) • Promotion via the event app, Innovation Lab listings and on-site signage • Scheduling and curation support to maximise delegate flow • Option to link activation to a related stage session or workshop • Inclusion in post-event engagement reporting 	Tech-led firms, platforms and innovators wanting standout, experiential engagement
Exhibitor / Village Partner	£8,400	<ul style="list-style-type: none"> • Branded stand in the Wealth Village • Access to intelligent matchmaking & 1-2-1s • Inclusion in event app and delegate guide • On-site networking and demos 	Providers focused on pipeline and direct engagement
Networker Partner	£5,250	<ul style="list-style-type: none"> • Access to the Wealth Village and networking areas • Participation in data-led matchmaking • Attendance at social and networking events 	Firms prioritising relationship-building and market presence
Digital Takeover	POA	Branded presence across key digital touchpoints before, during and after the event	Brands seeking scale, frequency and high recall
Enhanced Insight Pack	POA	Detailed post-event data, trends, delegate profiling and insight	Strategy, product and go-to-market teams
Branding Enhancements	POA	Stage, zone or digital branding opportunities	Sponsors looking to amplify visibility

(Pulse Pricing offers a preferred rate for a 2-year commitment to our shared vision). Availability is limited to ensure the highest quality experience for all attendees.



CONTACT US

Register your interest

Get in touch today – the best slots always go early!



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The background of the right side of the slide features a large, vibrant image of a crowded event space, likely a financial conference or festival. A prominent sign in the upper right corner reads "Festival of Finance" in white text on a dark background, accompanied by a logo consisting of three slanted parallel lines. The overall scene is filled with people, some standing and some walking, under bright, colorful lighting.



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