

2026



SPONSORSHIP OPPORTUNITIES

EXCLUSIVE EVENTS | INSIGHTS & RESEARCH | CONTENT CREATION

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WHO WE ARE AND WHAT WE DO



EXCLUSIVE EVENTS

- Meeting of Minds
- Thematic Events
- Business Briefings
- Red Folder Events
- Festival of Finance
- Whole of Market



INSIGHTS & RESEARCH

- The Pulse
- Market Intelligence
- Industry Workshops
- Research Findings



CONTENT

- Content Creation
- Webinars and Interviews
- High-level Networking Meetings



ACCELERATING RISING TALENT

- C-suite Access
- Strategic Insight
- Elite Mentorship
- Peer Network

Programme starting early January 2026

OUR EVENTS PORTFOLIO

Our mission is to enable financial services to do better business. We bring together the industry's most influential strategic minds to tackle shared challenges and deliver actionable insights. We provide more than just a meeting place. We offer a platform for change.

Backed by decades of research and expert consultancy, we provide a high-level environment where key influencers can connect, collaborate, and shape the future of the sector commercially, strategically, and ethically.

[View 2026 Sponsorship Opportunities](#)

a meeting of
MINDS

Our flagship bi-annual event unites senior leaders from top wealth firms for strategic dialogue and confidential networking.

WEALTH**TECH**
MATTERS

Our biannual series connects COOs with the technology and strategies driving operational excellence.

PARAPLANNING
Excellence

Bringing together 120 Paraplanners, Analysts and Technical Support who work with advisers from the top 500 UK IFAs and Wealth Managers and Private Banks.

RETIREMENT
MATTERS

This tactical event series delivers actionable insights to the industry's key retirement strategists.

The Beacon Forum
Powered by NPC

A gathering for leaders in social impact, uniting wealth managers and philanthropists to shape a better future.

FutureMinds

A year-round programme connecting future leaders from major advice and wealth firms with peers, senior mentors, and strategic insights through events, networking, and Meeting of Minds.

Festival of
Finance

The largest, must-attend annual industry event for the UK IFA and Wealth Management industry.

RED
Folder Events

Tailored, build-your-own events with custom agendas and formats, curated audiences, and sponsor-led content.

Strategic

Thematic

Next Gen

Red Folder &
Briefings

OUR AUDIENCE GROUPS

Mapping our audience landscape and the communities we serve



Mid-Sized IFA Firms

DA firms with £150-700 million AUM
(or 5-15 advisers)

CEOs
Managing Directors
Proposition Heads
Paraplanners

- Meeting of Minds Winning Advisers
- Scotland Meeting of Minds
- Retirement Matters
- Paraplanning Excellence
- Festival of Finance



Large IFA Firms

Top 100 UK Advisory Distributors i.e. the Nationals, Consolidators, Regionals, Networks, Rating Agencies, advice arms of Retail Banks and IFA.

CEOs
Managing Directors
COOs
CTOs
CFOs
CIOs
Proposition Heads
Heads of Investment
Paraplanners

- Meeting of Minds Advisory Distributors
- WealthTech Matters
- Retirement Matters
- The Beacon Philanthropy & Impact Forum
- Paraplanning Excellence
- Festival of Finance
- FutureMinds



Wealth Management & Private Banking

CEOs
Managing Directors
COOs
CTOs
HR Directors
Proposition Heads
CIOs
Heads of Investment
CFOs
Paraplanners

- Meeting of Minds Wealth Management and Private Banking
- Meeting of Minds Gatekeepers
- WealthTech Matters
- Retirement Matters
- The Beacon Philanthropy & Impact Forum
- Paraplanning Excellence
- Festival of Finance
- FutureMinds



Asset Management

CEOs
Managing Directors
COOs
CTOs
HR Directors

- Meeting of Minds
- Beacon Philanthropy & Impact Forum
- Festival of Finance

a meeting of MINDS

A Meeting of Minds is our flagship programme of biannual events which brings the most senior decision makers from the client facing side of a particular sector of financial services (the delegates) alongside firms who support them with innovative solutions through their products and services (the sponsors). Together they examine the key strategic issues facing the industry and seek to table solutions.



EVENT	WHO WILL BE THERE?	WHEN & WHERE
Wealth Management & Private Banking	Bringing together 70 strategic and investment heads from the Wealth Managers, DFMs, Private Banks and MFOs.	<ul style="list-style-type: none"> • Thursday 23 April* NEW FOR 2026 Rudding Park, Harrogate • Thursday 11 June Berkeley Hotel, London • Thursday 12 November Berkeley Hotel, London
Gatekeepers	Bringing together 50 Heads of Fund Selection/Research from the top 100 UK investment companies across both Wealth Management and Advisory.	<ul style="list-style-type: none"> • Thursday 12 March Berkeley Hotel, London • Thursday 1 October Berkeley Hotel, London
Advisory Distributors*	Bringing together 70 strategic and investment heads from the Nationals, Networks, Regionals, advisory arms of Retail Banks, IFAs and fund rating agencies.	<ul style="list-style-type: none"> • Thursday 25 June Tylney Hall Hotel & Gardens, Hook • Thursday 26 November Down Hall, Bishop's Stortford
Winning Advisers*	Bringing together 60 business heads from the top 100-500 Independent Financial Advisory firms which typically have between £150M and £700M Assets Under Management and 5-20 advisors. Both in the north and south.	<ul style="list-style-type: none"> • Thursday 23 April Rudding Park, Harrogate • Thursday 19 November: Tylney Hall Hotel & Gardens, Hook
Meeting of Minds Scotland*	Bringing together 70 top CEOs and Managing Directors from the leading financial advice and wealth management firms which typically have 3 advisers and £150m Assets Under Management.	<ul style="list-style-type: none"> • Wednesday 4 November Dunblane, Scotland

*includes networking dinner and accommodation the night before.

WEALTHTECH MATTERS

WealthTech Matters is a series of events for key decision makers from the Wealth Management, Private Banking and large Adviser firms.

Technology is core to the future wealth management model but, in an increasingly specialist technology environment, wealth managers must engage with a deeper knowledge and understanding of what technology is available and can deliver across the three main areas of their business; their clients, their advisers, staff and their business.

The series focuses on these three themes and will discover and discuss technology solutions that solve key challenges facing their business.

EVENT	WHO WILL BE THERE?	WHEN & WHERE
WealthTech Matters	Bringing together 60 COOs and their technology teams from the DFMs, Wealth Managers, Private Banks and large Advisers	Spring <ul style="list-style-type: none">• Thursday 7 May SEI Investments, London Autumn <ul style="list-style-type: none">• Thursday 8 October SEI Investments, London



RETIREMENT MATTERS

Retirement Matters is a one-day conference considering the retirement ecosystem and the opportunity it offers for increased client satisfaction and business growth. The agenda will seek to thrash out the challenges facing the retirement space.

It will update you on the latest thinking and innovative solutions as well as provide a review of the backdrop – demographic, economic and regulatory. There is much to discuss as all these areas impact the whole country economically and emotionally.

EVENT	WHO WILL BE THERE?	WHEN & WHERE
Retirement Matters	Bringing together 200 decision makers from UK financial advisers and wealth managers. This will include Heads of Business, Heads of Proposition, Financial Planners and Relationship Managers and Paraplanners.	<ul style="list-style-type: none">Thursday 30 AprilThe Royal College of Physicians, London



PARAPLANNING Excellence

Paraplanning Excellence is the definitive forum for the wealth management industry's technical leaders and investment writers, the architects responsible for shaping the advice market.

Hosted at Schroders' headquarters, the event facilitates a high-level discourse on the structural shifts shaping client advice, from the practical application of AI tools to the translation of global fiscal policy into resilient portfolios. It is a curated environment designed to bridge the gap between macroeconomic theory and the deliverable outcomes that define client value.

EVENT	WHO WILL BE THERE?	WHEN & WHERE
Paraplanning Excellence	150 top investment writing paraplanner from the top UK Wealth Managers and Adviser firms.	• Wednesday 2 December Schroders' Office, London





The Beacon Philanthropy and Impact Forum

The Beacon Philanthropy and Impact Forum is a unique event designed to connect philanthropists, NGOs, government regulators, foundations and financial institutions.

Following The Beacon Collaborative's merger with New Philanthropy Capital (NPC) in 2025, the 2026 forum at the Guildhall serves as a unique cross-sector summit, uniting over 500 leaders from the trust, foundation, and private wealth communities.

The agenda is defined by the development of the UK's new Office for the Impact Economy. With ministers and policy makers in attendance, the forum provides a rare platform for "tri-sector" collaboration—bridging the divide between government, private capital, and civil society. The dialogue moves beyond theoretical debate to address the "connective mobilisation" of private resources at scale, exploring the intersection of responsibility, pragmatism, and purpose in wealth-holding families.

EVENT	WHO WILL BE THERE?	WHEN & WHERE
The Beacon Philanthropy and Impact Forum	Bringing together 500 key decision makers from Impact Sector Enterprises, bodies and infrastructure organisations, impact investors and philanthropists, impact fund managers, non-profits, Wealth Managers, IFAs and Private Banks and policy makers and regulators.	<ul style="list-style-type: none">• Wednesday 11 February The Guildhall, London

Festival of Finance

The Festival of Finance is the largest, must-attend annual industry event for the UK IFA and Wealth Management industry. Launching in September 2026, this is not just a conference, it is a high-energy festival designed to redefine how the industry convenes, learns, and evolves.

Bringing together a curated cohort of 500 advisers, planners, and wealth managers, the event represents a decisive shift away from the traditional forum. It creates an immersive environment where professional rigour meets collective ambition. The itinerary is architected to deliver a seamless blend of CPD-accredited learning, macro-strategic insight, and high-level peer collaboration, uniting the entire ecosystem in a singular moment of industry elevation.

This is the definitive platform where strategy, technology, and personal mastery converge. From innovation showcases to leadership dialogue, the Festival of Finance offers a networking engine at scale, setting the stage for a new era of connection and commercial opportunity.

EVENT	WHO WILL BE THERE?	WHEN & WHERE
Festival of Finance	Bringing together 500 representatives from regulated financial advisers and wealth managers.	• 29 September Birmingham Repertory Theatre

**THE LARGEST, MUST-ATTEND
ANNUAL INDUSTRY EVENT
IN 2026 FOR THE UK IFA
AND WEALTH MANAGEMENT
INDUSTRY.**

FutureMinds

FutureMinds is the industry's dedicated leadership accelerator, designed to empower the rising stars who will define the next decade of UK wealth management. Operating as a year-round programme rather than a single event, it provides a structured, high-touch development pathway for the sector's most promising talent.

Built on four unique strategic assets, Future Minds offers an experience that cannot be replicated internally. Participants gain direct access to the C-suite through curated participation in our renowned Meeting of Minds events, receive personal mentorship from industry veterans, and leverage real-time intelligence from The Pulse to sharpen their strategic decision-making. By connecting emerging leaders across firms, the programme fosters a powerful peer network that will drive the industry forward.

For firms, this is a strategic investment in succession planning and retention. For participants, it is a career-defining platform that equips them with the commercial acumen, confidence, and connections required to lead in a rapidly transforming sector.

ANNUAL PROGRAMME STRUCTURE

QUARTER 1 INSIGHT & IDENTITY STRUCTURE

- Welcome Summit
- Leadership strengths assessment
- The Pulse Masterclass
- Mentor matching and kick-off
- Future Leaders Social

QUARTER 2 ACCESS & EXPOSURE

- Participation in Meeting of Minds
- Closed door leadership clinic
- Introduction to cross-firm project teams

QUARTER 3 SKILLS & APPLICATION

- Strategic Thinking Bootcamp
- The Pulse Strategy Lab
- Innovation Sprint
- Networking Evening

QUARTER 4 IMPACT & GRADUATION

- Cross-Firm Project Presentations
- Final mentor reflection
- Completion of the Future Leader Playbook
- Graduation Dinner & Alumni Induction



Our Red Folder Events is built on years of deep industry relationships, market insight, and the trusted community we've developed through our flagship event series. We don't just run events — we curate the right conversations with the right people.

With specialist knowledge of the wealth management and private banking sector, and extensive senior-level contacts, we help you unlock meaningful dialogue, strengthen relationships, and create commercial opportunities. Whether you're planning a business briefing, annual forum or product launch, we'll create a bespoke experience that aligns with your goals and engages your audience.

Our Business Briefings are a quarterly series designed for senior leaders across the industry, including COOs, CFOs, CEOs, Heads of Wealth, HR Directors and Philanthropy. They provide unparalleled access to the board and executive teams of the largest UK IFA, Wealth and Asset Management firms.



RUNNING FOR 10 YEARS

EVENT	WHEN & WHERE
CFO Business Briefings	<ul style="list-style-type: none"> • H1: Thursday 15 January Thursday 14 May • H2: Thursday 17 September
COO Business Briefings	<ul style="list-style-type: none"> • H1: Thursday 20 January Thursday 5 March Thursday 12 March Thursday 4 June • H2: Wednesday 1 July Thursday 10 September Thursday 1 October Tuesday 2 December TBC Wednesday 3 December TBC (Asset Management)
CEO Business Briefings	<ul style="list-style-type: none"> • H1: Wednesday 4 March • H2: Wednesday 30 September
HR Directors Business Briefings	<ul style="list-style-type: none"> • H1: Thursday 5 February Tuesday 19 May • H2: Tuesday 15 September
Heads of Wealth Business Briefings	<ul style="list-style-type: none"> • H1: Thursday 29 January Wednesday, 13 May • H2: Thursday 22 October Wednesday 3 December TBC
Philanthropy Briefings	<ul style="list-style-type: none"> • H1: Wednesday 20 May • H2: Thursday 24 September
Milliman Briefing	<ul style="list-style-type: none"> • H1: Tuesday 2 February

The Pulse

The Pulse is our research and insights platform built from over 20 years of strategic conversations with the UK's largest distributors, advisers and providers. It brings together all our quantitative and qualitative research including Scene Setter data, roundtable findings, polling, session selections and behavioural patterns - giving you a real-time snapshot of the themes shaping the industry



MARKET INSIGHTS

Understand what is truly 'keeping industry leaders up at night' – from macro trends to specific challenges.



STRATEGIC ALIGNMENT

Allows a firm to benchmark its strategy against peers and ensure its market approach is perfectly aligned.



TARGETED ENGAGEMENT

Transforms interactions into data-driven conversations, leading to more tangible business opportunities.

Sponsorship package

Partner with us for two years and The Pulse becomes your annual membership - delivering:

- 25% off all Meeting of Minds events
- Continuous access to key buyers
- A full library of insights and content
- Strategic intelligence to shape your market approach

Pricing

- £8,000 annually for two licences
- £1,000 per additional licence

(Event participation discounted by 25% when bundled via a recurring package.)

OUR USPS

TAILORED
RESEARCH,
TARGETED
DATABASE,
ROI



How our events stand out from the crowd:

1. TAILORED EVENT CAMPAIGNS

Partnering with one of our events offers you an entire campaign for maximum exposure. We become a natural extension of your team throughout the whole event cycle.

2. CALIBRE OF AUDIENCE

Access to our established database

We can deliver the right people at the right level. We have an in-depth knowledge of the industry and have extensive contacts.

3. INSIGHTFUL CONTENT & DATA

Historical audience research

Using data captured at our flagship Meeting of Minds and other events, we can help shape the event agenda and offer invaluable intel on the industry.

4. DELIVERING AN EFFECTIVE CAMPAIGN

Support post event with follow-up to maximise your ROI

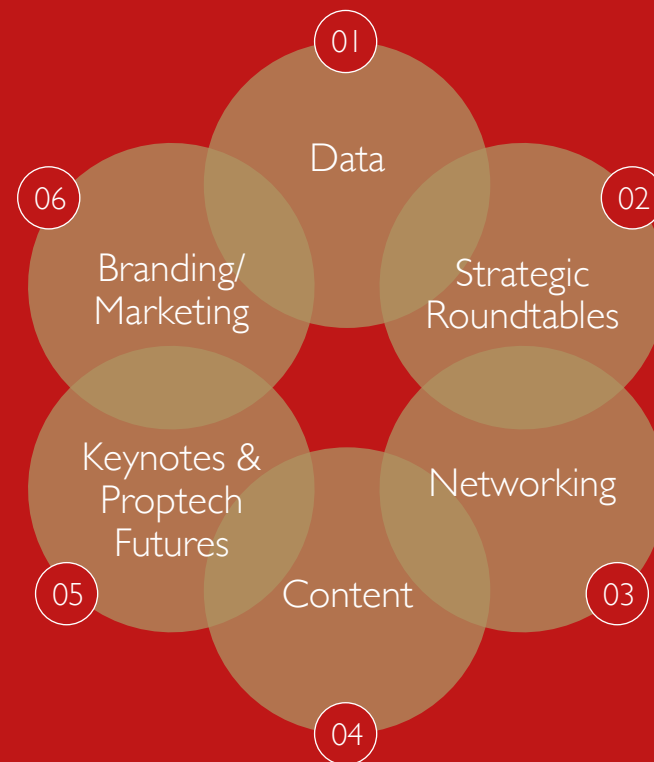
We capture the highlights of the conversation and produce tangible outputs. We offer support in securing follow up meetings with those that attended.

A SIX MONTH ENGAGEMENT

Owen James events aren't one-off experiences, we are working with you to ensure you maximise the opportunity throughout.

THE POWER OF SIX

Our events incorporate SIX key elements to ensure you maximise your return on investment - both financially and timewise



DATA PROVIDED BEFORE THE EVENT

The invited audience (the delegation) do not pay to participate. However, the quid pro quo is that we ask them to provide data and profiling information. This enables us to produce a summary report of the industry at a moment in time. We call it the **SCENE SETTER RESEARCH**.

It also means we can compare and contrast with other parts of the FS industry. You will receive the full research outputs before the event thereby enabling you to prepare for the day.

You will also be provided with information around the delegation via the **EVENT APP** which you will be invited to download in advance of the Meeting. This includes personal and company bios as well as photos to aid recognition!

AD HOC POLLING: thanks to the Event App, we are able to question our audience at any stage of the proceedings. This is sometimes done during the keynotes and sometimes during the roundtables. Our experience is that it increases interaction – particularly if used during the roundtables.



DATA PROVIDED AFTER THE EVENT

POST EVENT FOLLOW UP

You will continue to have access to the app. In addition, you will be provided with an excel listing of participants' contact details. Owen James stands ready to support any follow up you are struggling with. We undertake to contact up to five people on your behalf.



POST EVENT FEEDBACK REPORT

All roundtable participants are asked to feedback on the roundtables in which they take part. This data is collated for you and provides a benchmark as to the success of your roundtable. Participants in the roundtable are also asked if they would like a follow up call. Again this is collated and passed onto you. More general feedback is collected to give you a sense of the success of the event in general. Transparency is key.

BRAND AWARENESS MONITOR

The delegation are asked how aware they are of your brand. For those of you who have supported past events, we are able to provide this data in trended format.



STRATEGIC ROUNDTABLES

An opportunity to roll up your sleeves and find out what your clients are thinking.

Various sponsorship packages available, that include the chance to:

- Attend as a networker
- Run a TechTalk
- Be a Headline Sponsor

All sponsors are invited to lead a roundtable discussion for typically some 12 –15 delegates. These groups are held in private meeting rooms and are strictly Chatham House rules.

In advance of the Meeting, Owen James produces a **DRAFT AGENDA**. This is written on the back of substantial research amongst participants and will reflect the key issues worthy of discussion on the day.

There may be a subject within the document which aligns naturally with your firm's strategic objectives. If not, you are of course able to propose your own subject and we will work with your team to create a roundtable synopsis which will resonate with the delegation. These roundtables are not an opportunity to pitch, they are an opportunity for you to engage strategically with industry leaders you are keen to impress – to be seen as an expert/thought leader.

SUPPORTING MATERIAL

SCENE SETTER FINDINGS

The outputs of the research carried out in the run up to the event are available for ongoing reference and perhaps a more measured review by your team.

WHITE PAPERS

The event app provides a platform to include any white papers you wish to push out into the marketplace. They may be relevant to your roundtable subject matter or more general thought leadership generated by your company.

KEYNOTE PRESENTATIONS

Where appropriate, and provided we are given permission, keynote presentations will be made available on the event app by the end of the Meeting.

THE FINDINGS

The outputs from each roundtable will be written up as a two page white paper. The full report is published as The Findings. Featuring your logo, this is published on our website in a searchable format. This content may of course be used by your own company.

OUR TRUSTED PARTNERS



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If you would like to organise a bespoke event, do reach out.

Owen James Red Folder Events is a strategic resource for the financial services industry. If you are planning a tailored in-house event, we are the team to deliver it on your behalf. From breakfast briefings to full-scale annual conferences, whether virtual, hybrid, or in-person, we guarantee a bespoke and exceptional experience.

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 @OwenJames

 @OwenJamesFS

WHAT OUR PARTNERS SAY

CHIEF EXECUTIVE OFFICER, BENCHMARK CAPITAL

The best event for networking with peers, learning from experts and catching up on the latest industry trends.

HEAD OF BUSINESS STRATEGY, GSAM STRATEGIC ADVISORY SOLUTIONS, GSAM

Absolutely the number one industry conference globally. The ideas, audience and conversations are top-notch and extremely helpful to any financial adviser and for advisory businesses.

HEAD OF CLIENT SERVICES, FIDELIUS

Thought-provoking, informative, interactive and educational event - extremely well run.