

# Owen James - A Year of Opportunities 2026

| EVENT                                                                             | DATE                                                                              | LOCATION                                                                          | PARTICIPANTS                                                                                                                                                                                                    |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  |  |  |                                                                                                                              |
| Targeting Financial Advisers                                                      |                                                                                   |                                                                                   |                                                                                                                                                                                                                 |
| <b>A Meeting of Minds - Advisory Distributors</b>                                 | Thursday<br>25 June                                                               | Tylney Hall Hotel & Gardens,<br>Ridge Lane, Rotherwick,<br>Hook, RG27 9AZ         | Bringing together 70 strategic and product heads from the top 100 UK Advisory Distributors: ie the Nationals; Consolidators; Regionals; Networks; Rating Agencies; advice arms of Retail Banks; and IFAs.       |
|                                                                                   | Thursday<br>26 November                                                           | Down Hall Hotel, Matching<br>Rd, Hatfield Heath, Bishop's<br>Stortford, CM22 7AS  |                                                                                                                                                                                                                 |
| <b>A Meeting of Minds - Winning Advisers (northern focus)</b>                     | Thursday<br>23 April                                                              | Rudding Park,<br>Rudding Ln, Follifoot,<br>Harrogate, HG3 1JH                     | Each regional iteration will bring 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 advisers. |
|                                                                                   | Thursday<br>8 October                                                             | Tylney Hall Hotel & Gardens,<br>Ridge Lane, Rotherwick,<br>Hook, RG27 9AZ         |                                                                                                                                                                                                                 |
| <b>Scotland Meeting of Minds</b>                                                  | Thursday<br>19 November                                                           | DoubleTree by<br>Hilton, Perth Rd,<br>Dunblane, FK15 OHG                          | Bringing together 60 top CEOs and Managing Directors from the leading financial advice and wealth management firms which typically have over 3 advisers and £150m Assets Under Management.                      |
| <b>Ireland Meeting of Minds</b>                                                   | Tuesday<br>20 October                                                             | TBC,<br>Dublin                                                                    | Bringing together 50 top CEOs and Managing Directors from the leading financial advice and wealth management firms which typically have over 3 advisers and £150m Assets Under Management.                      |
| <b>VouchedFor and Owen James Events Adviser Awards</b>                            | Thursday<br>7 May                                                                 | The Biltmore, 44<br>Grosvenor Square,<br>London, W1K 2HP                          | An awards ceremony like no other bringing together 200 leading advisers to celebrate all that is good about advice. The awards will be decided by the ultimate judge - advisers' clients.                       |
| Targeting Paraplanners                                                            |                                                                                   |                                                                                   |                                                                                                                                                                                                                 |
| <b>Paraplanning Excellence</b>                                                    | Tuesday<br>17 November                                                            | Schroder's Offices I<br>London Wall Place,<br>London, EC2Y 5AU                    | Bringing together 120 Paraplanners, Analysts and Technical Support who work with advisers from the top 500 UK IFAs and Wealth Managers and Private Banks.                                                       |

Arrange a meeting to find out more:

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|  |  |  |                                                                                                             |
| Targeting Wealth Managers & Private Banks                                         |                                                                                   |                                                                                   |                                                                                                                                                                                                |
| A Meeting of Minds -<br>Wealth Management<br>& Private Banking                    | North<br>Thursday<br>23 April                                                     | Rudding Park, Rudding Ln,<br>Follifoot, Harrogate,<br>HG3 1JH                     | Bringing together 70 CEOs and the CIOs from Global Private<br>Banks, DFMs, MFOs and Wealth Managers whose particular<br>focus is UK.                                                           |
|                                                                                   | Thursday<br>11 June                                                               | The Berkeley Hotel,<br>Wilton Place, Knightsbridge,<br>London, SW1X 7RL           |                                                                                                                                                                                                |
|                                                                                   | Thursday<br>12 November                                                           | The Berkeley Hotel,<br>Wilton Place, Knightsbridge,<br>London, SW1X 7RL           |                                                                                                                                                                                                |
| Targeting Fund Selectors                                                          |                                                                                   |                                                                                   |                                                                                                                                                                                                |
| A Meeting of Minds -<br>Gatekeepers                                               | Thursday<br>12 March                                                              | The Berkeley Hotel, Wilton<br>Place, Knightsbridge,<br>London, SW1X 7RL           | Bringing together 50 Heads of Fund Selection and Fund Research<br>from the top 100 advisory and discretionary UK wealth<br>management companies across both Wealth Management<br>and Advisory. |
|                                                                                   | Thursday<br>1 October                                                             | The Berkeley Hotel,<br>Wilton Place, Knightsbridge,<br>London, SW1X 7RL           |                                                                                                                                                                                                |
| Targeting Asset Managers                                                          |                                                                                   |                                                                                   |                                                                                                                                                                                                |
| A Meeting of Minds -<br>Asset Management                                          | Thursday<br>22 October                                                            | TBC,<br>London                                                                    | Bringing together 50 CEO's, COO's & C-Suite asset managers<br>focused on distribution and proposition.                                                                                         |
| Thematic Events                                                                   |                                                                                   |                                                                                   |                                                                                                                                                                                                |
| Focusing on Technology                                                            |                                                                                   |                                                                                   |                                                                                                                                                                                                |
| WealthTech Matters<br>- The Series                                                | Spring<br>Tuesday<br>12 May                                                       | SEI Investments,<br>Finsbury Square,<br>London, EC2A 1BR                          | Each iteration will focus on the different key elements of your<br>business: your clients, your relationship managers and your<br>overarching business model.                                  |
|                                                                                   | Autumn<br>Thursday<br>5 November                                                  | SEI Investments,<br>Finsbury Square,<br>London, EC2A 1BR                          | Bringing together 60 COOs, CTOs and their teams from the<br>largest UK Wealth Management companies.                                                                                            |

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| Focusing on Retirement                                                            |                                                                                   |                                                                                   |                                                                                                                                                                                                                                                                                                                                                         |
| Retirement Matters                                                                | Thursday<br>30 April                                                              | The Royal College of Physicians, 11 St Andrews Pl, London, NW1 4LE                | 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.                                                                                                                                        |
|                                                                                   | Thursday<br>15 October                                                            | The Royal College of Physicians, 11 St Andrews Pl, London, NW1 4LE                |                                                                                                                                                                                                                                                                                                                                                         |
| Focusing on Impacting & Philanthropy                                              |                                                                                   |                                                                                   |                                                                                                                                                                                                                                                                                                                                                         |
| The Beacon Philanthropy & Impact Forum                                            | Wednesday<br>11 February                                                          | The Great Hall, Guildhall Yard, London, EC2V 5AE                                  | Bringing together 500 sector & business heads from the UK wealth managers & private banks, philanthropists and sector pioneers                                                                                                                                                                                                                          |
| NEW FOR 2026!                                                                     |                                                                                   |                                                                                   |                                                                                                                                                                                                                                                                                                                                                         |
| Targeting the Financial Sector                                                    |                                                                                   |                                                                                   |                                                                                                                                                                                                                                                                                                                                                         |
| FinFest                                                                           | Thursday<br>24 September                                                          | TBC, London                                                                       | A pre-cursor to a fully-fledged festival in 2027 (which will bring together over 2000 advisers and wealth managers). This event will bring together a blend of 500 strategic heads, advisers & RMs and paraplanners all looking to grow business                                                                                                        |
| Targeting Future Leaders                                                          |                                                                                   |                                                                                   |                                                                                                                                                                                                                                                                                                                                                         |
| Future Minds                                                                      | TBC                                                                               | TBC, London                                                                       | A series of events and content targeting the future leaders from the largest advice and wealth management firms. A campaign of activity plugging them into networking events with their peers and current strategic leaders (through A Meeting of Minds), strategic insights through the Pulse, and a network of mentors made of recent senior leaders. |

## Keep your finger on The Pulse

### Partner with Owen James to build meaningful campaigns that maximise your distribution

In 2025, we launched The Pulse – our dynamic, digital portal offering exclusive insights into the most influential trends shaping the distribution landscape. For nearly two decades, we've brought together senior leaders from the largest financial services distributors to collaborate and strategize. This unmatched access has enabled us to gather rich quantitative and qualitative data throughout each event cycle. Now, The Pulse is the only place to explore our latest research and intelligence. Whether your goal is to grow your distribution, build brand awareness, position yourself as a thought leader, better understand your target market, or launch new products - partner with us to craft a campaign that delivers results.



**Red Folder Events** - Or want to organise your own bespoke event? Owen James Red Folder Events is a strategic events resource for the financial services industry.

If you are planning to organise a tailored and in-house event, Red Folder Events is the team to deliver it on your behalf.

Ranging from a breakfast briefing, lunch briefing, annual conference or full day event - and either held virtually, hybrid or in person - Red Folder Events guarantee a tailored and wow-experience.

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| Quarterly Business Briefings                                                      |                                                                                   | A blend of virtual and in person events held at:                                  |                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Business Briefings</b><br>Chief Financial Officers (CFO)                       | January<br>April<br>September                                                     | The Walbrook Club,<br>37A Walbrook,<br>London EC4N 8BS                            | Owen James, in association with Solve, are bringing together Chief Financial Officers from the largest Wealth Managers & Private Banks for short, sharp updates on the key challenges facing their businesses.                                                                                                                                                                                           |
| <b>Business Briefings</b><br>Chief Operating Officers (COO)                       | January<br>May<br>September<br>November                                           | Andaz, 40 Liverpool Street, London, EC2M 7QN, United Kingdom                      | Owen James, in association with Solve, are bringing together COOs from the largest Wealth Managers & Private Banks to explore topics such as how they can manage cost income ratios more effectively; best of breed outsourcing; how to keep the regulator happy; and provide a high quality service.                                                                                                    |
| <b>Dinner Briefings</b><br>Chief Executive Officers (CEO)                         | March<br>September                                                                | The Walbrook Club,<br>37A Walbrook,<br>London EC4N 8BS                            | In conjunction with A Meeting of Minds, Owen James in association with Solve will be running a bi-annual series of exclusive dinners bringing together CEOs from the largest Wealth Managers & Private Banks for short, sharp updates on the key challenges facing their businesses and an opportunity to strategise with each other.                                                                    |
| <b>Breakfast Briefings</b><br>Chief Investment Officer (CIO)                      | January<br>September<br>November                                                  | London Venue,<br>TBC                                                              | Owen James is looking to create a new platform, the aim being to bring together a group of investment heads for a short, sharp and to the point update on market and investment trends as well as an opportunity to discuss those issues facing the busy CIOs.                                                                                                                                           |
| <b>Breakfast Briefings</b><br>Philanthropy in Wealth Management                   | May<br>October                                                                    | London Venue,<br>TBC                                                              | Owen James, in association with Solve, are bringing together Business Heads, Heads of Philanthropy and Heads of Portfolio Management from the largest Wealth Managers & Private Banks to share best practice and understand how we can offer more philanthropic services to clients effectively.                                                                                                         |
| <b>Breakfast Briefings</b><br>HR Directors                                        | January<br>May<br>September                                                       | The Offices of Farrer & Co, 66 Lincoln's Inn Fields, London WC2A 3LH              | Owen James, in association with Farrer & Co, has built a platform bringing together HR Directors from the largest UK Private Banks, Wealth & Asset Managers for regular updates and discussions on issues relating to recruitment, remuneration, retention; and leadership.                                                                                                                              |
| <b>Breakfast Briefings</b><br>Heads of Wealth Planning                            | February<br>May<br>September<br>November                                          | The offices of Octopus Investments, 33 Holborn, London EC1N 2HT                   | Owen James, in association with Octopus Investments, has built a platform bringing together Heads of Wealth/Financial Planning for regular updates on the issues which affect their day to day. These briefings explore topics such as regulation, the client journey/ interface, the impact of different technology and tax issues - all in the quest of providing the best possible customer outcomes. |

Owen James Events offers an unparalleled platform to increase brand awareness and network with peers.

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