

Owen James - A Year of Opportunities 2027

EVENT	DATE	LOCATION	PARTICIPANTS
			
Targeting Financial Advisers			
A Meeting of Minds - Advisory Distributors	Thursday 24 June	Old Thorns Hotel, Liphook, Hampshire	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 25 November	Down Hall Hotel, Matching Rd, Hatfield Heath, Bishop's Stortford	
A Meeting of Minds - Winning Advisers (northern focus)	Thursday 22 April	Rudding Park, Rudding Ln, Follifoot, Harrogate	Each regional iteration will bring together 60 business heads from the top 100-500 Independent Financial Advisory firms which typically have between £100M and £800M Assets Under Management and 3-20 advisers.
	Thursday 18 November	Old Thorns Hotel, Liphook, Hampshire	
Scotland Meeting of Minds	Thursday 11 November	Apex Dunblane Hotel, Perth Road, Dunblane	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.
Targeting Paraplanners			
Paraplanning Excellence	Thursday 2 December	Schroder's Offices 1 London Wall Place, London	Bringing together 150 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 - Wealth Management & Private Banking	Thursday 10 June	TBC, London	Bringing together 70 CEOs and the CIOs from Global Private Banks, DFM's, MFOs and Wealth Managers whose particular focus is UK.
	Thursday 4 November	The Waldorf Hilton, London Aldwych, London	
Targeting Fund Selectors			
A Meeting of Minds - Gatekeepers	Thursday 11 March	Ironmongers' Hall, Shaftesbury Place, Barbican, London	Bringing together 50 Heads of Fund Selection and Fund Research from the top 100 advisory and discretionary UK wealth management companies across both Wealth Management and Advisory.
	Thursday 7 October	The Waldorf Hilton, London Aldwych, London	
Thematic Events			
Focusing on Technology			
WealthTech Matters - The Series	Spring Thursday 6 May	SEI Investments, Finsbury Square, London, EC2A 1BR	Each iteration will focus on the different key elements of your business: your clients, your relationship managers and your overarching business model.
	Autumn Thursday 14 October	London venue Tbc	Bringing together 60 COOs, CTOs and their teams from the largest UK Wealth Management companies.

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Focusing on Retirement			
Retirement Matters	Tuesday 25 May	The Royal College of Physicians, 11 St Andrews Pl, London, NW1 4LE	Bringing together 150 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.
Focusing on Impacting & Philanthropy			
The Beacon Philanthropy & Impact Forum	Wednesday 10 February	The Great Hall, Guildhall Yard, London, EC2V 5AE	Bringing together 650 sector & business heads from the UK wealth managers & private banks, philanthropists and sector pioneers
Targeting the Financial Sector			
Festival of Finance	Thursday 23 September	Tobacco Dock, London	Bringing together 1500 senior advisers, planners and wealth managers for a day of unrivalled insights, CPD learning, strategic dialogue, peer-to peer collaboration and meaningful commercial engagement
Targeting Future Leaders			
FutureMINDS	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 over 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:	
Business Briefings Chief Financial Officers (CFO)	January May September November	The Walbrook Club, 37A Walbrook, 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.
Business Briefings Chief Operating Officers (COO)	January March June September December	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.
Dinner Briefings Chief Executive Officers (CEO)	February April May July October November	The Walbrook Club, 37A Walbrook, 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.
Breakfast Briefings Asset Management Chief Operating Officers (COO)	January March June November December	London Venue, 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.
Breakfast Briefings Philanthropy in Wealth Management	May September	London Venue, 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.
Breakfast Briefings HR Directors	February September November	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.
Breakfast Briefings Heads of Wealth Planning	January March May September 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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