SCOTLAND
a meeting of MINDS

Wednesday 4 November *(with an optional dinner the night before)*

DoubleTree by Hilton, Perth Rd, Dunblane FK15 0HG

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a meeting of MINDS

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imagine a day WHERE YOU...

one

Spend your time in the company of some **very senior clients** – all of whom have carefully been identified and invited personally. **A balance of CEOs and Managing Directors from the leading financial advice and wealth management firms.**

two

Hold one-to-one meetings with them, speed **network**, sit with them over a very civilised lunch, understand their thinking, business strategy and issues so that you can prepare to respond to them.

three

Lead your own roundtables and discuss the strategic issues affecting your industry both at a macro level and a more granular level – small pre-researched roundtable groups in private rooms observing Chatham House rules.

four

Understand the **key data points** within the industry in terms of sentiment and financials and, where relevant, how they compare with other FS sectors.

five

Hear **inspirational** and **informative keynotes**. **Hear from leaders that are transforming the industry**.

six

Promote awareness of your business via branding and marketing activity carried out on your behalf.

seven

Follow a **personalised itinerary** built ahead of the day around your thought-through choices. All operated from an easy to use app.

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your opportunity to sponsor

SCOTLAND
A MEETING OF MINDS







We invite you and your firm to be one of a group of **nine sponsor firms.** Ideal sponsors would be Platforms, Tech firms, Asset Managers, Retirement & BR providers, Law firms, and Management Consultants – all with a need to understand and build relationships with your client base – to **increase awareness**.

We offer a **clear cut all inclusive and transparent fee structure** (The cost to lead a roundtable is £21,000+VAT (Pulse price £15,750+VAT) - for one networker and your roundtable expert, other packages and discounts are available.

Scotland Meeting of Minds will take place at **Apex Dunblane Hydro, Perth Rd, Dunblane FK15 0HG** which provides **the levels of service and style you would expect.**



who are OWEN JAMES?

Owen James has been organising strategic events for the financial services industry for over 20 years!

We have weathered the odd financial crisis and pandemic! And we feel fairly confident we can provide good references. **Our goal has consistently been to act as an enabler for firms who want to do better business** – commercially, intelligently and ethically. Hopefully our longevity proves that we have had some success.

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) together with those firms who manufacture the products they sell and those firms who support them with innovative solutions and services (the sponsors). Together they examine the key strategic issues facing the industry and seek to table solutions.

Please click here to see the full SPONSORSHIP OPPORTUNITIES for 2026

the delegates WHO ARE THEY?

Identifying and inviting the delegation. Fundamental to the success of A Meeting of Minds is the way we go about inviting the delegation – your potential customers. We research them carefully to ensure they fulfil our criteria i.e. they must be at least Director level – we aim for C suite – and they must hold executive decision-making powers.

Firms we will be looking to invite are those from **the leading financial advice and wealth management firms (ie DA firms with >3 advisers/RMs and AUM > £150m).**





Some examples of the firms we will be inviting:

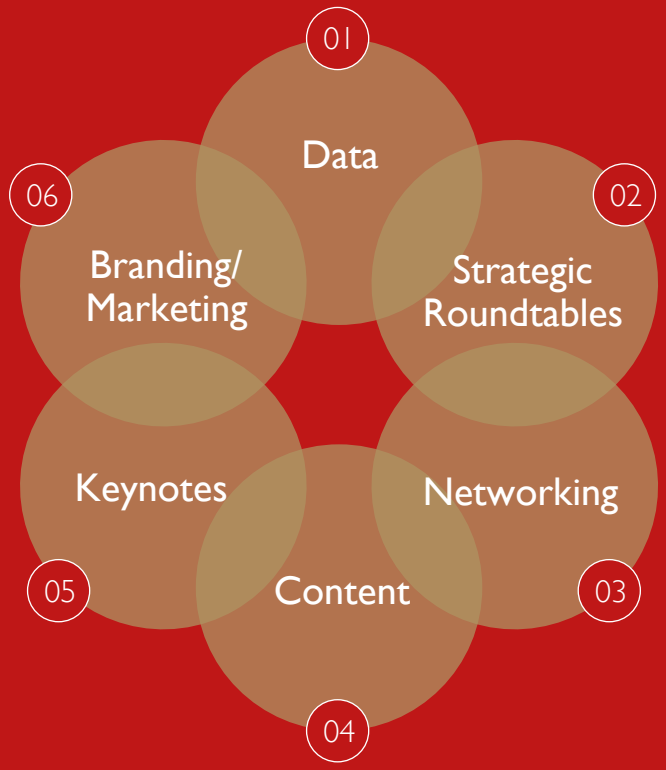
- *336 Financial Management Limited*
- *Abrdn*
- *Fairstone Financial Management Ltd*
- *Henderson Stone Asset Management*
- *J M Taylor Financial Services Limited*
- *JP Maxwell Financial Management Ltd*
- *Lockhart Consultancy Ltd*
- *Octagon Wealth Management Ltd*
- *Ravenstone Financial Management Ltd*

a six month ENGAGEMENT

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

THE POWER OF SIX

A Meeting of Minds incorporates SIX key elements to ensure you maximise your return on investment -both financially and timewise



data oils the wheels BEFORE AND AT THE MEETING

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 **Industry Insights.**

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 oils the wheels AFTER THE MEETING

POST EVENT FOLLOW UP

You will continue to have access to the app. In addition, you will be provided with a 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.



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strategic ROUNDTABLES

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

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.

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.

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strategic ROUNDTABLES



THE DETAIL

Your subject expert will be invited to provide a ten minute introduction before the roundtable is opened up to the group. Ahead of the event, you will be introduced to a facilitator whose role is to ensure everyone "leans in" and to ensure the conversation keeps moving forward.

As the delegation are asked to choose which sessions they want to take part in, you will be engaging with a group who already have an interest in the subject.

The outputs are written up anonymously providing all with a summary of what was discussed. You have the final sign off. They are published as **THE POST-EVENT FINDINGS.**

These roundtables last one hour. Your roundtable will take place once. However if it is super popular with the delegates then we will ask if you would like to run it twice. There will be three roundtables throughout the day and you will be offered the opportunity to sit in on the other session(s).

it's good TO TALK

So how do we ensure the networking happens?

Ahead of the event, we will ask you to have a look at the delegate list and cherry-pick up to ten people with whom you would particularly like to have a fifteen minute one-to-one meeting.

From this, we will ensure you are lined up with **two one-to-one meetings**. These will take place over breakfast and morning coffee. It is not a perfect science which is why we ask for 'extra' names. On the day, the Owen James team will be focused on ensuring these meetings take place





AD HOC NETWORKING

We actually call this speed networking. By lots of cunning manipulation we seat you opposite potential customers and you are given five minutes in which to charm them and exchange cards. Or touch phones … whatever one does these days. You will hold five ad hoc meetings.

ONE TO ONE

Hand pick who you would like to meet over the coffee breaks.

PRE-EVENT DINNER

Enjoy a relaxed dinner the night before and meet your peers in a more informal setting over great food and drinks ahead of the event day.

supporting MATERIAL

THE PULSE

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 and published on The Pulse. Available on our website in a searchable format. This content may of course be used by your own company.

branding AND MARKETING

A key reason to sponsor an Owen James Meeting of Minds is to raise your profile amongst this very senior audience.

BLOGGING

If you would like to convert your roundtable white paper into a blog – we can support.



YOUR BRANDING

Will appear on all event collateral:

EVENT WEBPAGE

LISTING OF PARTICIPANTS

THE APP

EVENT HOLDING SLIDE

SOCIAL MEDIA

Owen James is keen to build the social media element of your participation.

Over and above the regular tweeting of who is supporting our events, we can tweet the individual white papers produced as part of The Findings.

We seek engagement with your own social media team.

BRAND AWARENESS MONITOR

We will as always ask our audience how aware they are of your brand?

For those of you who have supported past events, we will provide this data in trended format.



example SCHEDULE OF THE DAY

Day before			
Main room	1900-2200	Networking dinner and drinks	Seated for dinner at 19:45
On the day			
Conference Foyer	0830-0900	Coffee and pastries	Informal networking over breakfast and coffee
Strathmore Suite	0900-0920	Keynote	Welcome - Welcome, Setting the Scene. With James Goad
Wolfson Theatre	0920-1000	Keynote	Example: Expert insights on the geopolitical and economic landscape. With James Ashley.
Breakout Rooms	1000-1115	Roundtable Session	*Peers strategically discussing their chosen topics, all under Chatham House Rules*
Conference Foyer	1115-1135	Morning coffee	Grab a refreshment and catch up with your peers
Strathmore Suite	1135-1215	Networking	Structured networking - An opportunity to meet some new faces
Breakout Rooms	1215-1330	Roundtable Session	*Peers strategically discussing their chosen topics, all under Chatham House Rules*
Strathmore Suite	1330-1430	Lunch	A seated formal lunch
Strathmore Suite	1430-1500	Keynote	Example: Intelligence Over Information - Leading with influence & resilience. With Tim Bradshaw
Breakout Rooms	1500-1610	Roundtable Session	*Peers strategically discussing their chosen topics, all under Chatham House Rules*
Strathmore Suite	1610-1655	Keynote	Example: Purpose is the New Profit - Rethinking wealth, work and what really matters. With Dr Josh Littlejohn MBE
Strathmore Suite	1655-1800	Farewell and Fizz	We thank you for joining us and bid you farewell

For more information please contact one of the team



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