



Your Invitation to...

WINNING THE REGIONAL ROADSHOW ADVISERS

Rudding Park,
Harrogate

The Mere Golf Resort
& Spa, Knutsford

The Belfry Hotel,
Birmingham

Ellenborough Park,
Cheltenham

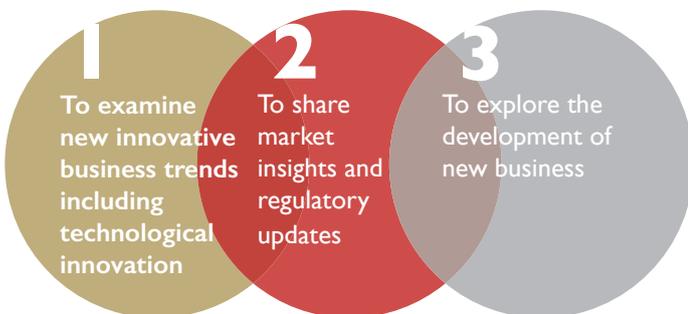
What it's all about....

Winning Advisers – the Regional Roadshow provides a unique opportunity to gain strategic insights and explore new business opportunities within the world of financial planning and advice. You will be owner managers of independently spirited financial advisory firms with a minimum of £80m FUM.

Our goal is to demand as little of your time as possible and to provide you with as rich an experience as possible on the day.



The focus of the day is threefold



“These events have the potential to change one’s business. Challenging, thought-provoking and a fantastic use of time.”

Group Chairman, Beaufort Group

Once you’ve signed up...

- Around six weeks before the event, we will be in touch with an agenda of roundtable subjects for discussion. It is up to you to decide in which sessions you would like to participate.
- We will also ask you to fill out a short questionnaire which we call Scene Setter Research. It is, of course, completely anonymous. This will be a combination of both current and ongoing issues so that, over time, we can track industry trends. This research is fed into the Roadshow’s agenda to ensure it is truly dynamic.



A walk through your day....

Winning Advisers - the Regional Roadshow will differ slightly from the usual Meeting of Minds.

- On arrival, we will welcome you and prepare you for your day ahead. Breakfast will give you a chance to network over coffee, pastries, fruit and yoghurt. You will then hear from the first keynote speaker before going into a roundtable session that you will have chosen beforehand. Your bespoke itinerary will be available on the Event App.
- Then onto a coffee break and more opportunities to network. This will be followed by three sponsor introductions, whose goal in taking part is to ensure that their offering is strategically aligned with your needs. All they ask is 15 minutes of your time to deliver a TED-style presentation on why you should be interested in their offering. They promise to make it concise, engaging and passionate.
- You will then participate in your second roundtable session before enjoying a delicious lunch.



- Lunch will be followed by two additional sponsor introductions and your final roundtable.
- We always aim to end your day on a thought-provoking and positive keynote, followed by a glass of fizz or a cup of tea depending upon your mode of transport!
- The day doesn't end there, as you will receive the Findings from the roundtable sessions and be able to access all your fellow participants' details and any presentations on the Event App for an entire year!
- Chatham House rules apply throughout the day to encourage an open conversation.

WINNING ADVISERS the Regional Roadshow

THE SCHEDULE OF THE DAY - AN EXAMPLE

0830-0900	Breakfast	Informal networking over breakfast
0900-0905	Presentation	Welcome
0905-0940	Keynote	<i>Paul Johnson, Director of the Institute for Fiscal Studies, one of the most influential economic commentators in the country, will provide an informed analysis of all things relating to pensions and retirement.</i>
0940-1045	Working Sessions 1	Session 1 Session 2 Session 3 Session 4
1045-1105	Coffee	Apple and BlackBerry time!
1105-1155	Sponsor Introductions	Getting to know the sponsors – 15 minute TED-style blasts around why the providers want your attention
1155-1300	Working Sessions 2	Session 1 Session 2 Session 3 Session 4
1300-1415	Luncheon	A seated formal luncheon
1415-1450	Sponsor introductions	Getting to know the sponsors – 15 minute TED-style blasts around why the providers want your attention
1450-1555	Working Sessions 3	Session 1 Session 2 Session 3 Session 4
1555-1630	Keynote	<i>A gold medal for customer service – Linda Moir headed up the 15,000 front of house Games Makers at the 2012 London Olympics. She was also Virgin Atlantic's Director of In Flight Services, responsible for the airline's award winning service and 'making flying fun'.</i>
1630-1730	Afternoon Tea and Champagne	Time for some networking and farewells



“A worthwhile day out of the office with like-minded IFAs in an environment where we could discuss our businesses”

Managing Director, John Lamb

Who will be there with you?

To demonstrate the calibre of your fellow participants, here is a sample of those who joined us at A Meeting of Minds – Winning Advisers in October 2017 at Pennyhill Park, Surrey.

Aim Independent Ltd *Managing Director*

Atwoods Ltd *Managing Director*

Certus Financial Planning Ltd *Director*

Clairville York *Director*

Clifton Asset Management PLC *Group Financial Planning & Business Development Director*

Fiducia Wealth Management Limited *Managing Director*

Go IFA Ltd, Managing Director

Headley Financial Services Ltd, *Director*

John Lamb LLP, *Managing Director*

Joseph Lamb *Chief Executive Officer*

Lifetime Wealth Management Ltd *Adviser*

Tees *Executive Director*

Tom French & Associates Ltd *Compliance Director*

Walden Capital *Chief Executive Officer*

Warwick Financial Solutions Limited *Managing Director*

Wise Investment *Financial Planning Manager*

“An excellent event. Informative, fun and friendly.”

Managing Director, Compliance First Ltd

Who are Owen James?

- Owen James provides a platform for strategic engagement: an opportunity for key individuals to discuss and understand the trends and innovations which are affecting their individual businesses as well as their industry as a whole. The end game being to enable firms to do better business – commercially, intelligently and ethically.

Call of action....

The only cost is your time.

To secure your place, please email or telephone Katherine or Emily:

Emily Landless

emilylandless@owenjamesgroup.com

01483 862698

Katherine Fortson

katherinefortson@owenjamesgroup.com

01483 862 693

Four dates, four locations,
your choice.

If you're available we would love to see you
at one of the locations below:

"A delightful event."

**Tilney Investment
Management Services**



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**Tuesday 24
April 2018**
The Mere Golf Resort
& Spa, Knutsford,
WA16 6LJ



3

**Wednesday
25 April 2018**
Rudding Park,
Harrogate,
HG3 1JH

4

**Thursday 26
April 2018**
The Belfry Hotel,
Birmingham,
B76 9PR

1

**Thursday
19 April 2018**
Ellenborough Park,
Cheltenham,
GL52 3NJ



Terms & Conditions

Definitions

In these terms and conditions, the following terms have the following meanings:

- The Event:** Winning Advisers
The Regional Roadshow
- The Organiser:** Owen James, its officers and representatives.
- The Delegate:** The individual who is invited to take part in the Event and who has provided their details to Owen James.

Event Participant

I understand that Owen James wishes to know that I have a full understanding of the terms of my participation. Accordingly, I confirm that I accept the Details and the Terms and Conditions listed herein.

If there is a contradiction between the Details and the Terms and Conditions - the Details take precedence. Please find below the terms and conditions for information purposes.

Details

- The Event:** Winning Advisers
The Regional Roadshow
- Venues:**
- | | |
|---------------|-------------------------------|
| 19 April 2018 | Ellenborough Park, Cheltenham |
| 24 April 2018 | The Mere, Cheshire |
| 25 April 2018 | Rudding Park, Harrogate |
| 26 April 2018 | The Belfry Hotel, Birmingham |

Meals and drinks: Breakfast and lunch will be provided on the basis agreed between the organiser and the hotel.

Hotel rules: You must abide by the rules and regulations as set down by the hotel.

Terms and Conditions

Law and Jurisdiction: These terms and conditions shall be construed in accordance with English law and any disputes resulting from an interpretation of these terms and conditions shall be settled by an English court.

Postponement or abandonment: The Delegate shall not have any claim against the Organiser in respect of any loss or damage consequent upon the failure, for whatever reason, to hold the Event or of the hotel being unable to hold the Event.

Cancellation terms: If you have been allocated a free space at the event and you choose to cancel your participation on or less than 30 days out from the Event date, the cancellation fee will be £250 plus VAT.

The exclusion of personnel: The organiser reserves the right to exclude or remove from the Event any person whose presence in the opinion of the Organiser is, or is likely to be, undesirable.

Insurance: The Organiser is not responsible for any personal injury nor for the safety of any property of the Delegate or other person, or for its loss or any damage sustained by a Delegate or other people, in each case for any reason whatsoever.

Information copyright and data protection: Information supplied by the Organiser in relation to the Event is accurate to the best of its knowledge and belief but shall not constitute any warranty or representation by the Organiser. Unless stated otherwise all information and data relating to the Event which is supplied by the Organiser to a Delegate is for use by the Delegate only, is the copyright of the Organiser and cannot be passed on to any third party for any purpose.

Use and disclosure of Personal Data: The Organiser will only use the information that it collects about the Delegate in accordance with its data protection notification pursuant to the Data Protection Act 1998. The Organiser collects Personal Data in order to be able to respond to requests for information and to provide the Delegate with the best possible service. This includes, but is not limited to, processing the personal data for the following purposes:

- Fulfilling event bookings
- Market research
- Marketing profiles
- Notifying the Delegate of any new services, events and features
- Providing a personalised service
- Strategic development
- Understanding the Delegate's needs

The Organiser will never collect sensitive personal information (eg racial origin) without the Delegate's explicit consent.

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