





# Owen James - A Year of Opportunities 2023

Please note that if/when required events will be held virtually and in-person events will offer a hybrid solution




EVENT	DATE	LOCATION	PARTICIPANTS
			
<b>Targeting Wealth Managers &amp; Private Banks</b>			
<b>A Meeting of Minds - Wealth Management &amp; Private Banking</b>	Thursday 8 June	The Berkeley Hotel, Wilton Place, Knightsbridge, London, SW1X 7RL	Bringing together the CEOs and the CIOs from Global Private Banks, DFMs, MFOs and Wealth Managers whose particular focus is UK.
	Thursday 16 November		
<b>Targeting Gatekeepers</b>			
<b>A Meeting of Minds - Gatekeepers</b>	Thursday 23 March	The Berkeley Hotel, Wilton Place, Knightsbridge, London, SW1X 7RL	Bringing together 50 Heads of Fund Selection and Fund Research from the top 100 advisory and discretionary UK wealth management companies (FUM >£1b) across both Wealth Management and Advisory.
	Thursday 12 October		
<b>Thematic events</b>			
<b>WealthTech Matters - The Series</b>	The Client: 16 March	SEI Investments, 14-18 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.  This is a collaboration between Owen James and The Wealth Mosaic to create a series of triannual events each bringing together 50+ COOs, CTOs and their teams from the largest UK Wealth Management companies.
	The Adviser: 15 June	The Aon Centre, 122 Leadenhall St, London EC3V 4AN	
	The Business: 9 November	The Offices of EY 1 More London Place, London, SE1 2AF	
<b>New for 2023!</b>			
<b>WealthTech Matters - (Switzerland)</b>	March date Tbc	Google Offices, Zurich, Switzerland	Building on the success of our UK series, this event will bring together 50+ COOs, CTOs and their teams from the top Private Banks, EAMs and Wealth Managers across Switzerland to explore new innovations in WealthTech and drive change in their business.
<b>Targeting Retail Banks &amp; Brands</b>			
<b>Individually sponsored: Virtual Verticals</b>	Dates - on demand	Roundtable events hosted online	Director level representatives from Retail Banking, Building Societies and Brands who have strategic oversight of their companies' financial services and product offering.
<b>A Meeting of Minds - Bank &amp; Brand Distribution of Retail Financial Services</b>	Thursday 28 September	London venue tbc	The objective of this event is to explore new partnership opportunities to distribute financial services into the mass market.

Arrange a meeting to find out more:

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<b>Targeting Financial Advisers</b>			
<b>A Meeting of Minds - Advisory Distributors</b>	Thursday 22 June	Tylney Hall Hotel & Gardens, Ridge Lane, Rotherwick, 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 23 November	The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL	
<b>A Meeting of Minds - Winning Advisers (northern focus)</b>	Thursday 27 April	Rudding Park, Rudding Ln, Follifoot, Harrogate HG3 1JH	Each regional iteration will bring together 70 business heads from the top 100-500 Independent Financial Advisory firms which typically have between £150M and £700M Funds Under Management and 5-20 advisers.
<b>A Meeting of Minds - Winning Advisers (southern focus)</b>	Thursday 5 October	Tylney Hall Hotel & Gardens, Ridge Lane, Rotherwick, Hook RG27 9AZ	
<b>Targeting Paraplanners</b>			
<i>NEW for 2023!</i> <b>A Meeting of Minds - Paraplanning</b>	Thursday 25 May	The Royal College of Physicians, 11 St Andrews Pl, London NW1 4LE	Bringing together 100 Paraplanners, Analysts and Technical support who work with advisers from the top 200 UK IFAs.
<b>Paraplanning Excellence</b>	Wednesday 1 November	Schroder's Offices   London Wall Place, London, EC2Y 5AU	
<b>New for 2023!</b>			
<b>Mindful of - The Future of Retirement</b>	Thursday 11 May	The Royal College of Physicians, 11 St Andrews Pl, London NW1 4LE	Bringing together 200 key decision makers (including CEOs, Managing Directors, Heads of Strategy, Heads of Retirement, Heads of Investment Proposition) who are setting the strategy when it comes to advising clients on their retirement planning options.



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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<b>Targeting Asset Managers</b>			
<b>Interactive Roundtables - A Meeting of Minds Asset Management</b>	CEO March September November	Virtual or In-Person briefings - locations TBC	Each event will bring together 20-25 C-Suite representatives from leading UK asset management firms with an interest in addressing current and future trends affecting their own businesses and the industry as a whole.
	COO May September November		
	CTO September March		
<b>Quarterly Breakfast Briefings</b>		<i>A blend of virtual and in person events held at:</i>	
<b>Breakfast Briefings</b> Chief Financial Officers (CFO)	January May September	The Offices of EY 1 More London Place, London, SE1 2AF	Owen James, in association with EY, has created a platform bringing together Chief Financial Officers from the largest Wealth Managers & Private Banks for short, sharp updates on the key challenges facing their businesses.
<b>Breakfast Briefings</b> Chief Operating Officers (COO)	February April September December	The Offices of EY 1 More London Place, London, SE1 2AF	Owen James, in association with EY, has created a platform 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>Breakfast Briefings</b> Chief Executive Officers (CEO)	May December	The Offices of EY 1 More London Place, London, SE1 2AF	In conjunction with A Meeting of Minds, Owen James in association with EY 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> Philanthropy in Wealth Management	March September	The Offices of EY 1 More London Place, London, SE1 2AF	Owen James, in association with EY, has created a platform 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> HR Directors	January May 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> Heads of Wealth Planning	March June September December	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.

Want to connect with the key decision makers within the industry? Have a new product to launch? Owen James Group offers an unparalleled platform to increase brand awareness and network with peers.

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