





Owen James - A Year of Opportunities 2024

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





EVENT	DATE	LOCATION	PARTICIPANTS
			
Targeting Wealth Managers & Private Banks			
A Meeting of Minds - Wealth Management & Private Banking	Thursday 13 June	The Berkeley Hotel, Wilton Place, Knightsbridge, London, SW1X 7RL	Bringing together the CEOs and the CIOs from Global Private Banks, DFM's, MFOs and Wealth Managers whose particular focus is UK.
	Thursday 14 November		
Targeting Gatekeepers			
A Meeting of Minds - Gatekeepers	Thursday 14 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 across both Wealth Management and Advisory.
	Thursday 17 October		
Thematic events			
WealthTech Matters - LIVE	Switzerland 6 February	SIX ConventionPoint, Zürich, Switzerland	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.
WealthTech Matters - The Series	The Client: Thursday 7 March	SEI Investments, Finsbury Square, London EC2A 1BR	
	The Adviser: Thursday 4 July	One Moorgate Place, London, EC2R 6EA	
	The Business: Thursday 28 November	SEI Investments, Finsbury Square, London EC2A 1BR	
WealthTech Matters - Switzerland	Thursday 7 November	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.
Targeting Independent Mortgage Brokers			
Mortgage Meeting of Minds	Wednesday & Thursday 18 April	Down Hall, Matching Road, Hatfield Heath, Essex, CM22 7AS	Bringing together delegate firms from the large Independent Mortgage Brokers including online, Mortgage Networks and Mortgage Clubs as well as the client facing teams at the banks and building societies - all at board level.
	September date tbc	The Berkeley Hotel, Wilton Place, Knightsbridge, SW1X 7RL	

Arrange a meeting to find out more:

E danielgillmore@owenjamesgroup.com T +44 (0)1483 862 692

Owen James - A Year of Opportunities 2024

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

EVENT	DATE	LOCATION	PARTICIPANTS
			
Targeting Financial Advisers			
A Meeting of Minds - Advisory Distributors	Thursday 27 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 21 November	The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL	
A Meeting of Minds - Winning Advisers (northern focus)	Thursday 25 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.
A Meeting of Minds - Winning Advisers (southern focus)	Thursday 10 October	Tylney Hall Hotel & Gardens, Ridge Lane, Rotherwick, Hook RG27 9AZ	
Targeting Paraplanners			
A Meeting of Minds - Paraplanning	Thursday 23 May	The Royal College of Physicians, 11 St Andrews Pl, London NW1 4LE	Bringing together Paraplanners, Analysts and Technical support who work with advisers from the top 500 UK IFAs and Wealth Managers and Private Banks.
Paraplanning Excellence	Wednesday 1 November	Schroder's Offices 1 London Wall Place, London, EC2Y 5AU	
Focusing on retirement			
Retirement Matters	Wednesday 25 September	The Royal College of Physicians, 11 St Andrews Pl, London NW1 4LE	Bringing together circa 150-200 of the good and the great of the industry to thrash out the challenges in the retirement space. This will include retirement decision makers from the UK advisers and wealth managers (with AUM >£100m); workplace, actuarial and employee benefit consultants; and pension trustees.



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.

Arrange a meeting to find out more:

E danielgilmore@owenjamesgroup.com **T** +44 (0)1483 862 692

