



a meeting of MINDS

Invitation to engage,
strategise and network
with your biggest clients

Partner with A Meeting of Minds and be part of
an event supporting the financial services industry

A guide to sponsorship -
offering valuable business and
brand awareness opportunities

A unique opportunity

The biannual A Meeting of Minds provides a unique opportunity to strategise with the key representatives and product influencers from the largest financial services institutions.

There are four distinct divisions:

- **Wealth Management and Private Banking** - focusing on the CEOs and CIOs of private banks and wealth managers, who look after the financial affairs of a private client

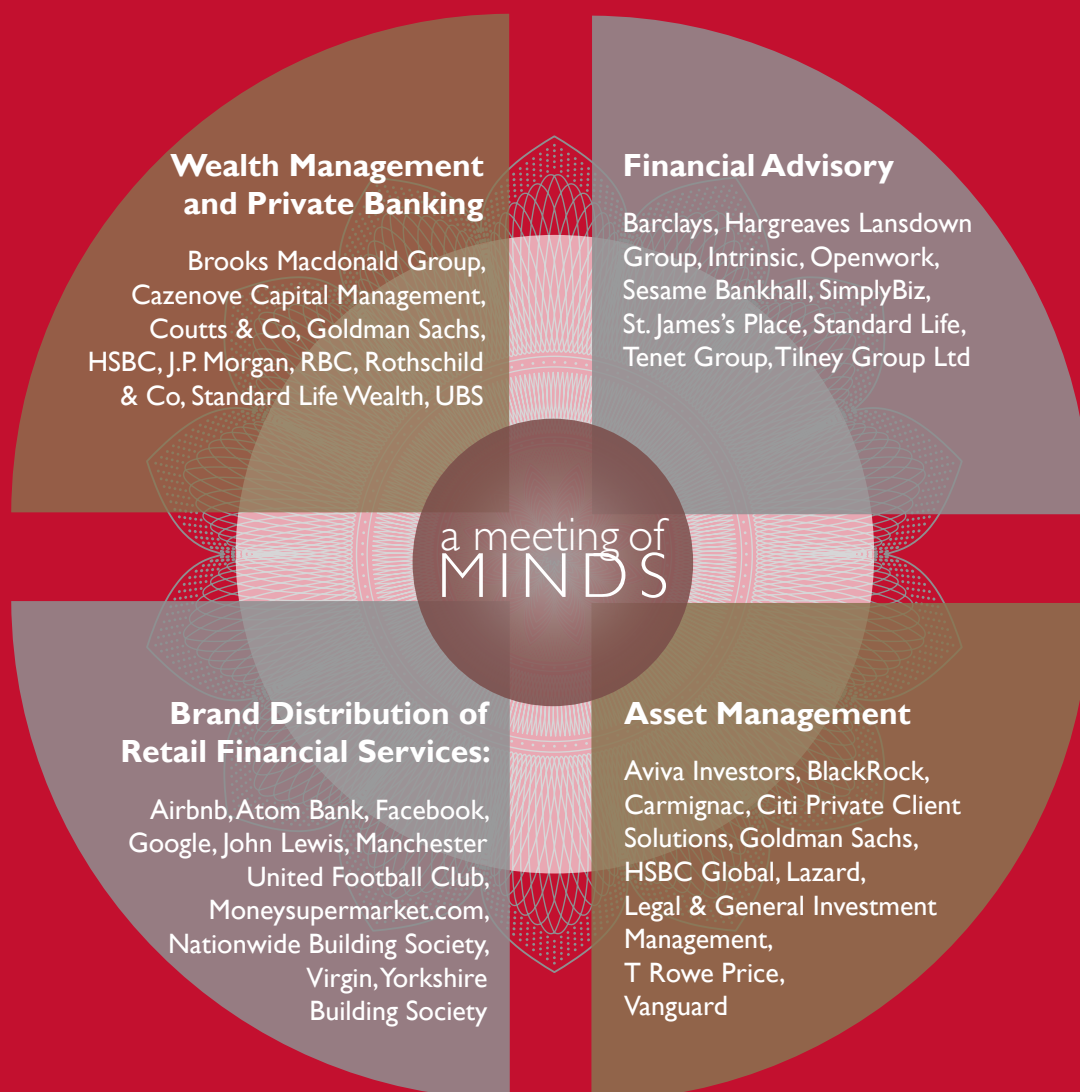
A Meeting of Minds prides itself on the calibre of delegates that attend each event and to ensure this, the recruitment process begins six months before each Meeting.

Participants can attend by invite only and to qualify must meet strict criteria and be a decision maker.

Previous delegates have included representatives from:

- **Financial Advisory** - incorporating distributors and owner managers of advisory firms that understand the issues affecting the engine of financial advice
- **Brand Distribution of Retail Financial Services** - senior executives involved in setting strategy across distribution, client services, product design and marketing
- **Asset Management** - heads of retail distribution with interest in current trends within the industry

It is known that **80%** of business is done by **20%** of the sector and it is A Meeting of Mind's goal to ensure the **20%** is identified.



There is also an extensive range of Independent Financial Advisors that attend, including: Aisa Professional, Clairville York, Go IFA, Holden and Partners, Joseph Lamb, Lucas Fettes & Partners, Prosperity IFA.

The event

Sponsorship is significantly more than brand awareness and exposure, over a sixth month period you will gain access to:

Before the event

- **Client data** - Quantitative and qualitative research conducted amongst participants to identify key issues. Findings will be shared a couple of weeks before the meeting to ensure preparation and to pre-identify prospects
- **Market testing topics** - Support and advice regarding roundtable presentation topic and content

Day of event

- **Positioning as a thought leader** - Sponsor hosted roundtable:
 - Opening address to spark debate and encourage fresh and original thinking
 - Provided facilitator steers the conversation allowing the sponsor to expand on the topic and answer any questions
 - All sessions are recorded and outputs are published, within Chatham House rules
 - Unique chance to network and have honest and open discussions with peers
 - Participants will recognise your brand as a supporter of their sector
- **Networking at the highest level**
 - Up to three pre-arranged one-to-one meetings with potential business partners
 - Speed networking
 - Select guests to collaborate with during meal times
 - Build relationships with key associates

- **Awareness** - Big picture keynotes, three presentations designed to inspire and get the audience to think outside the box
- **Branding** - Brand awareness on the main stage, app and website. Opportunity to include gifts and promotional material in the participants goodie bags

Post event

Previous sponsors have seen a substantial return in investment and new business developments. Part of the sponsorship package value occurs once the event has happened:

- **Strategic and market insight** - Receive a summary of findings that identifies challenges within the industry and can be utilised to ensure your business strategy is in line with clients' needs
- **Post-event marketing** - Outputs of roundtables are published and distributed amongst participants gaining extra exposure and illustrating the company's support of the industry
- **Follow up opportunities** - Missed an opportunity to speak to one of the participants? A Meeting of Minds will arrange a conversation between the chosen parties
- **Online business tools** - Access to the event app containing contact details of all the participants and the opportunity to post whitepapers
- **Inducement busting** - Given the strategic nature of the events and sponsor contribution, the partnership complies with inducement rules

"A Meeting of Minds is extremely well organised and offers unrivalled access to CEOs and CIOs from the biggest UK intermediary firms. Goldman Sachs, relatively new to the retail market, partner with the event as it is a great catalyst for engagement and networking opportunities. Another valuable aspect is the gateway it provides to connect with contacts and leads, post event." **Malcolm Mackenzie, Goldman Sachs**

"Multrees have been working with Owen James for over four years and are delighted with the results the partnership has shaped. In that time we have seen a significant rise in business and the events we sponsor give us the platform to establish and strengthen peer relations. I would highly recommend working with the team." **Chris Fisher, Multrees**



A Meeting of Minds is so much more than just a meeting



A Meeting of Minds presents unique and tailored events - enabling financial services to do better business.

This opportunity allows you to strategise and deepen relations with key influencing decision makers from your largest distributors.

Get involved

Arrange a meeting with Joint Managing Director James Goad, to find out more:

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