



# Breakfast Briefings

*Bringing together  
senior decision  
makers...*

## THE BIG IDEA:

- The aim of an Owen James Breakfast Briefing is to bring together senior decision makers from a niche community every three months for a short, sharp and to the point update on key themes and issues critical to their business.
- As the pace of business life continues to speed up, 0800–1000 first thing in the morning is considered an excellent and acceptable time for our senior bods to devote to some strategic thinking.

## What is in it for you as a sponsor?

- You will be seen as being supportive of the industry by facilitating this strategic engagement;
- You will be viewed as actively influencing progress and learning within the industry;
- You will raise awareness of your brand by being displayed on all communication material and through physically playing the host.

## How do these sessions work?

- Each Breakfast Briefing (0800-1000) will bring together individuals drawn from a carefully researched and identified audience – typically a homogeneous grouping around job title/function.
- Through research with the proposed audience, Owen James will support you to produce the agenda.
- Typically these briefings will address two or three key topics. Each topic is introduced by an expert and then opened up to the group for a fuller discussion.
- Owen James will document and publish the outputs after each briefing. Chatham House Rules apply.
- The goal is to create a community of peers.



*...for networking  
over coffee & buns*

Some evidence that we know what we are doing:

## PRESENT:

We currently run the following series of Briefings:

**Chief Operating Officers** from Wealth Management & Private Banking on behalf of EY;

**Heads of Philanthropy** from Wealth Management & Private Banking on behalf of EY;

**Heads of Wealth/Financial Planning** from Private Banking & Wealth Management on behalf of Octopus Investments;

**Chief Financial Officers and Financial Directors** from Wealth Management & Private Banking on behalf of EY;

**Heads of Human Resources** from Private Banking & Wealth Management on behalf of Farrers and Paradox.

## PAST:

For three years, we successfully organised strategic breakfast briefings for the CEOs of the largest private banks and wealth managers. The goal was to help these institutions prepare for the introduction of RDR. Sponsored by JPMorgan Asset Management, they positioned the host as a champion for the industry.

On behalf of Just Retirement, we focused on bringing together the key influencers within the retail banking community with the aim of coming up with a solution to prepare for the substantial number of interest only mortgage holders approaching retirement with insufficient funds.

## Your involvement as a sponsor:

- You will provide the venue and breakfast: a space to accommodate some 25-30 people - preferably around one large round table along with room for networking over coffee and buns.
- You will act as chair, ensuring super tight time keeping.
- You will ensure that the agenda and post briefing write up produced by Owen James are “technically” accurate.
- All correspondence will of course carry your logo.

## Owen James' involvement?

- Source and invite the participants – achieving the desired level of seniority.
- Handle all communications with participants.
- Source external experts (if thought appropriate) to support the agreed subject matter.
- Produce the agenda as well as capture the outputs from these sessions. As the subject matter may well be very technical, we will seek support from the sponsor company to ensure accuracy.

## The cost

1 x Breakfast briefing

£8,500 plus VAT

4 x Breakfast briefing @ £6,250

£25,000 plus VAT

If you wanted to team up with another firm, we will of course be very happy to run with that.

### Contact:

If you want to get in front of a particular senior group from either wealth management and private banking; retail banking or advisory firms we would love to support, do please call us on 01483 861334 or email us on: [hannahjackson@owenjamesgroup.com](mailto:hannahjackson@owenjamesgroup.com)

Owen James Group, Brook House,  
Mint Street, Godalming, Surrey, GU7 1HE

T +44 (0)1483 861334  
W [www.owenjamesgroup.com](http://www.owenjamesgroup.com)

