



SPONSORSHIP OPPORTUNITIES

# OWEN JAMES

## and the event series

Owen James seeks to provide a platform for strategic engagement within the finance sector, an opportunity for key individuals to discuss and understand the business and investment issues which are affecting the whole of their industry.

The end game being to enable financial services firms to do better business - commercially, intelligently and ethically.

Our mission is to deliver sustainable and diverse, world-class research and events for the financial sector, where key decision makers can connect, be inspired and together, influence change.

Please click here to see the full [SPONSORSHIP OPPORTUNITIES for 2024](#)

## Ultimately, we do four types of events:



### Community-driven events

Strategic, biannual events bringing together decision makers from the largest distributors in certain channels;

- Wealth Managers & Private Banks
- Top 100 Advisers
- Top 100-500 regional Advisers
- Gatekeepers (heads of fund selection/research)
- Paraplanners
- Mortgage



### Thematic events

Triannual event series offering the opportunity to present tech solutions to COOs and their teams from the top Wealth Management & Private Banks and the largest Advisory firms.



Tactical event for key retirement decision makers who are setting the strategy when it comes to advising clients on their retirement planning options.



### Bespoke events

Owen James Red Folder Events offers the total event management solution tailored to your needs. It can deliver all elements of your event requirements, from identifying and inviting the audience, to delivering an awesome event experience.



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# a meeting of MINDS

A Meeting of Minds is our flagship programme of biannual events which brings the most senior decision makers from the client facing side of a particular sector of financial services (the delegates) together with those firms who manufacture the products they sell and those firms who support them with innovative solutions and services (the sponsors). Together they examine the key strategic issues facing the industry and seek to table solutions.



EVENT	WHO WILL BE THERE?	WHEN & WHERE
<b>Wealth Management &amp; Private Banking</b>	Strategic and investment heads from the Wealth Managers, DFMs, Private Banks and MFOs.	<ul style="list-style-type: none"> <li>• Thursday 13 June</li> <li>• Thursday 14 November</li> </ul> The Berkeley Hotel, London
<b>Gatekeepers</b>	Heads of fund selection and fund research from the top 100 UK investment companies across both wealth management and advisory.	<ul style="list-style-type: none"> <li>• Thursday 17 October</li> </ul> The Berkeley Hotel, London
<b>Advisory Distributors*</b>	Strategic and investment heads from the nationals, networks, regionals, advisory arms of retail banks, IFAs and fund rating agencies.	<ul style="list-style-type: none"> <li>• Thursday 27 June</li> </ul> Tylney Hall Hotel & Gardens Ridge Lane, Hook  <ul style="list-style-type: none"> <li>• Thursday 21 November</li> </ul> The Berkeley Hotel, London
<b>Winning Advisers*</b>	Advisers from top 100-500 IFAs, (i.e. 4-20 RIs and FUM >£100m). The events are split geographically into North and South	<ul style="list-style-type: none"> <li>• Northern Event</li> </ul> Thursday 25 April Rudding Park, Harrogate  <ul style="list-style-type: none"> <li>• Southern Event</li> </ul> Thursday 10 October Tylney Hall Hotel & Gardens Ridge Lane, Hook
<b>Mortgage</b>	Decision makers 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.	<ul style="list-style-type: none"> <li>• Thursday 24 October</li> </ul> The Royal College of Physicians, London
<b>Paraplanners</b>	Paraplanners, Analysts and Technical support who work with advisers from the top 200 UK IFAs, Private Banks, Wealth Managers.	<ul style="list-style-type: none"> <li>• Thursday 23 May</li> </ul> The Royal College of Physicians, London

\*includes networking dinner and accommodation the night before.

# WEALTHTECH MATTERS

WealthTech Matters UK is a series of events for key decision makers from the Wealth Management, Private Banking and large Adviser firms.

Technology is core to the future wealth management model but, in an increasingly specialist technology environment, wealth managers must engage with a deeper knowledge and understanding of what technology is available and can deliver across the three main areas of their business; their clients, their advisers and staff and their business.

The series focuses on these three themes and will discover and discuss technology solutions that solve key challenges facing their business.

The event is also held in Zurich, Switzerland.

EVENT	WHO WILL BE THERE?	WHEN & WHERE
<b>WealthTech Matters UK</b>	COOs and their technology teams from the DFMs, Wealth Managers, Private Banks and large Advisers.	<p><b>The Client</b></p> <ul style="list-style-type: none"> <li>Thursday 7 March SEI Investments, London</li> </ul> <p><b>The Adviser</b></p> <ul style="list-style-type: none"> <li>Thursday 4 July One Moorgate Place, London</li> </ul> <p><b>The Business</b></p> <ul style="list-style-type: none"> <li>Thursday 28 Nov SEI Investments, London</li> </ul>
<b>WealthTech Matters Switzerland</b>	COOs and their technology teams from the DFMs, Wealth Managers, Private Banks and large Advisers.	<ul style="list-style-type: none"> <li>Thursday 7 November Location TBC</li> </ul>



# RETIREMENT MATTERS

**Retirement Matters is a one-day conference considering the retirement ecosystem and the opportunity it offers for increased client satisfaction and business growth. The agenda will seek to thrash out the challenges facing the retirement space.**

**It will update you on the latest thinking and innovative solutions as well as provide a review of the backdrop – demographic, economic and regulatory. There is much to discuss as all these areas impact the whole country economically and emotionally.**

EVENT	WHO WILL BE THERE?	WHEN & WHERE
<p><b>Retirement Matters</b></p>	<p>Retirement decision makers from the UK advisers and wealth managers (with AUM &gt;£100m); workplace, actuarial and employee benefit consultants; and pension trustees.</p>	<ul style="list-style-type: none"> <li>• Wednesday 25 September Royal College of Physicians, London</li> </ul>

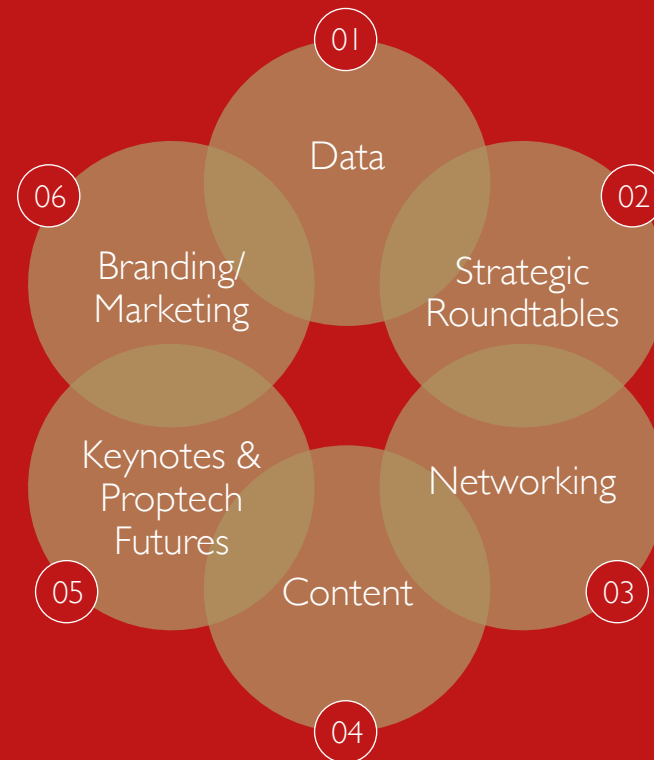


# a six month ENGAGEMENT

Owen James events aren't on-off experiences, we are working with you to ensure you maximise the opportunity throughout.

## THE POWER OF SIX

Our events incorporate SIX key elements to ensure you maximise your return on investment - both financially and timewise



# data provided **BEFORE THE EVENT**

The invited audience (the delegation) do not pay to participate. However, the quid pro quo is that we ask them to provide data and profiling information. This enables us to produce a summary report of the industry at a moment in time. We call it the **SCENE SETTER RESEARCH**.

It also means we can compare and contrast with other parts of the FS industry. You will receive the full research outputs before the event thereby enabling you to prepare for the day.

You will also be provided with information around the delegation via the **EVENT APP** which you will be invited to download in advance of the Meeting. This includes personal and company bios as well as photos to aid recognition!

**AD HOC POLLING:** thanks to the Event App, we are able to question our audience at any stage of the proceedings. This is sometimes done during the keynotes and sometimes during the roundtables. Our experience is that it increases interaction – particularly if used during the roundtables.





# data provided **AFTER THE EVENT**

## **POST EVENT FOLLOW UP**

You will continue to have access to the app. In addition, you will be provided with an excel (old school) listing of participants' contact details. Owen James stands ready to support any follow up you are struggling with. We undertake to contact up to five people on your behalf.



## **POST EVENT FEEDBACK REPORT**

All roundtable participants are asked to feedback on the roundtables in which they take part. This data is collated for you and provides a benchmark as to the success of your roundtable. Participants in the roundtable are also asked if they would like a follow up call. Again this is collated and passed onto you. More general feedback is collected to give you a sense of the success of the event in general. Transparency is key.

## **BRAND AWARENESS MONITOR**

The delegation are asked how aware they are of your brand. For those of you who have supported past events, we are able to provide this data in trended format.



# strategic ROUNDTABLES

**An opportunity to roll up your sleeves and find out what your clients are thinking.**

Various sponsorship packages available, that include the chance to:

- Attend as a networker
- Run a TechTalk/Mortgage Talk
- Be a Headline Sponsor

**All sponsors are invited to lead a roundtable discussion for typically some 12 –15 delegates. These groups are held in private meeting rooms and are strictly Chatham House rules.**

In advance of the Meeting, Owen James produces a **DRAFT AGENDA**. This is written on the back of substantial research amongst participants and will reflect the key issues worthy of discussion on the day.

There may be a subject within the document which aligns naturally with your firm's strategic objectives. If not, you are of course able to propose your own subject and we will work with your team to create a roundtable synopsis which will resonate with the delegation. These roundtables are not an opportunity to pitch, they are an opportunity for you to engage strategically with industry leaders you are keen to impress – to be seen as an expert/thought leader.

# it's good TO TALK

## So how do we ensure the networking happens?

Ahead of the event, we will ask you to have a look at the delegate list and cherry-pick up to ten people with whom you would particularly like to have a fifteen minute one-to-one meeting, and up to five people you would like to have lunch with.

From this, we will ensure you are lined up with **two one-to-one meetings**. These will take place over breakfast, morning coffee and afternoon tea. It is not a perfect science which is why we ask for "extra" names. On the day, the Owen James team will be focused on ensuring these meetings take place



### AD HOC NETWORKING

We actually call this speed networking. By lots of cunning manipulation we seat you opposite potential customers and you are given five minutes in which to charm them and exchange cards. Or touch phones ... whatever one does these days. You will hold five ad hoc meetings.

### POST EVENT DRINKS

After all that hard work an opportunity to kick back and have a glass of fizz with all your new friends .... before trying to find a train.

# supporting MATERIAL

## **SCENE SETTER FINDINGS**

The outputs of the research carried out in the run up to the event are available for ongoing reference and perhaps a more measured review by your team.

## **WHITE PAPERS**

The event app provides a platform to include any white papers you wish to push out into the marketplace. They may be relevant to your roundtable subject matter or more general thought leadership generated by your company.

## **KEYNOTE PRESENTATIONS**

Where appropriate, and provided we are given permission, keynote presentations will be made available on the event app by the end of the Meeting.

## **THE FINDINGS**

The outputs from each roundtable will be written up as a two page white paper. The full report is published as The Findings. Featuring your logo, this is published on our website in a searchable format. This content may of course be used by your own company.

# branding AND MARKETING

**A key reason to sponsor an Owen James event is to raise your profile amongst this very senior audience.**

## **BLOGGING**

If you would like to convert your roundtable white paper into a blog – we can support.



## **YOUR BRANDING**

Will appear on all event collateral:

### **EVENT WEBPAGE**

### **LISTING OF PARTICIPANTS**

### **THE APP**

### **EVENT HOLDING SLIDE**

### **POST EVENT FINDINGS**

## **SOCIAL MEDIA**

Owen James is keen to build the social media element of your participation.

Over and above the regular tweeting of who is supporting our events, we can tweet the individual white papers produced as part of The Findings.

We seek engagement with your own social media team.

## **BRAND AWARENESS MONITOR**

We will as always ask our audience how aware they are of your brand?

For those of you who have supported past events, we will provide this data in trended format.



# Get in touch for more information



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If you would like to organise  
a 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.

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 @OwenJames

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