



ALWAYS ENLIGHTENING

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.




VIRTUAL



HYBRID



IN-PERSON

A close-up photograph of a man in a dark suit and red shirt clapping his hands. The background is blurred, showing other people in a conference setting.

Owen James is known throughout the financial services industry for its unique approach to running prestigious events with refreshing and relevant content. Here are just some of the reasons why we are the perfect partner:

- We have run top-end events in the financial services arena since 2005
- A proven track record
- Established reputation for integrity and services
- An understanding of industry dynamics
- Innovative thinking around executing events
- Extensive contact database and industry thinking
- Access to substantial resources via our associates
- Offer both a virtual and hybrid package

A Meeting of Minds

Our Red Folder Events' division has grown from the relationships and knowledge developed through the Owen James brand - especially our core events offering A Meeting of Minds. We have an in-depth knowledge of the industry and have extensive contacts to ensure you can delve that little bit deeper.

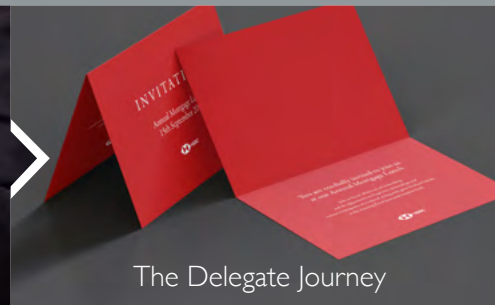
THE JOURNEY

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

Ranging from a breakfast briefing, lunch briefing, annual conference or full day event - and either held virtually, hybrid or in person - Red Folder Events will deliver:



Event Management & Logistics



The Delegate Journey



Venue Management



Conference Programme



AV - Management, Staging, New Ideas



Bespoke Event App



Marketing Support and Comms Plan



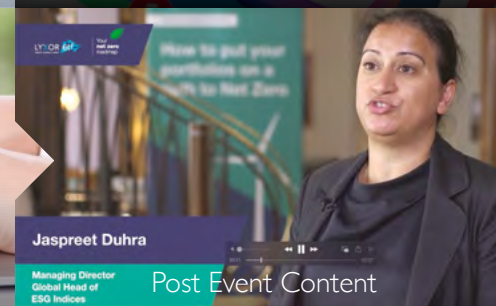
Bespoke Event Website



Polling



Post Event Website



Post Event Content



Post Event Analytics and Reports

STAND OUT

How Red Folder Events
stand out from the crowd.



TAILORED



RESEARCH



DATABASE



ROI

OUR USP's

1 **BRILLIANT EVENTS – Delivering a tailored and wow-experience**

Red Folder Events, part of Owen James Group, have over 16 years experience in the business. This encourages many ideas and fresh approaches for all event aspects. We will become a natural extension of your team and we aim to be a resource you can rely upon throughout the whole event cycle.

2 **CALIBRE OF AUDIENCE – Access to our established database**

We can deliver the right people at the right level. We have an in-depth knowledge of the industry and have extensive contacts throughout the following communities:

- Wealth Management and Private Banking - C Suite and Gatekeepers (heads of fund selection/research)
- Financial Advisory - CEO and CIO level
- Brand Distribution of Retail Financial Services - Senior decision-makers
- Asset Management - CEO & COO levels

3 **INSIGHTFUL CONTENT & DATA – Historical audience research**

Using data captured at our flagship Meeting of Minds brand, we can help shape the event agenda and offer invaluable intel on the industry.

4 **DELIVERING AN EFFECTIVE CAMPAIGN – Support post event with follow-up to maximise your ROI**

We capture the highlights of the conversation and produce tangible outputs. We offer support in securing follow up meetings with those that attended.

DELIVERABLES



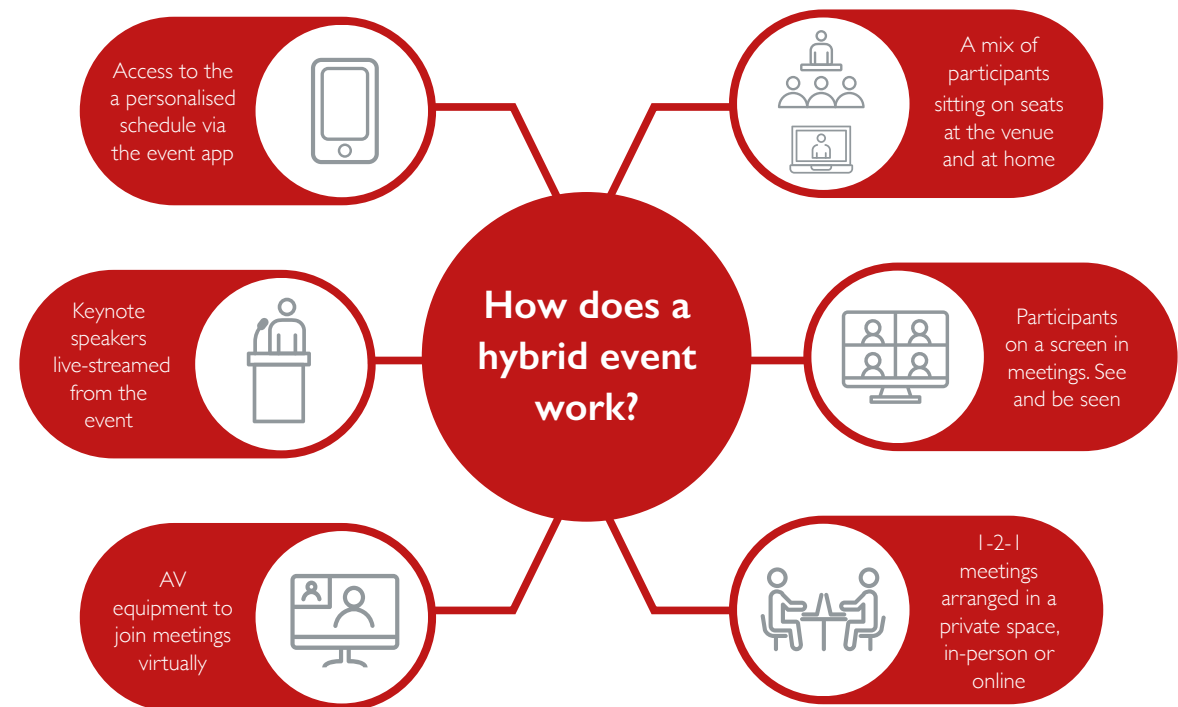
DELIVERING A VIRTUAL/HYBRID EVENT POST COVID-19

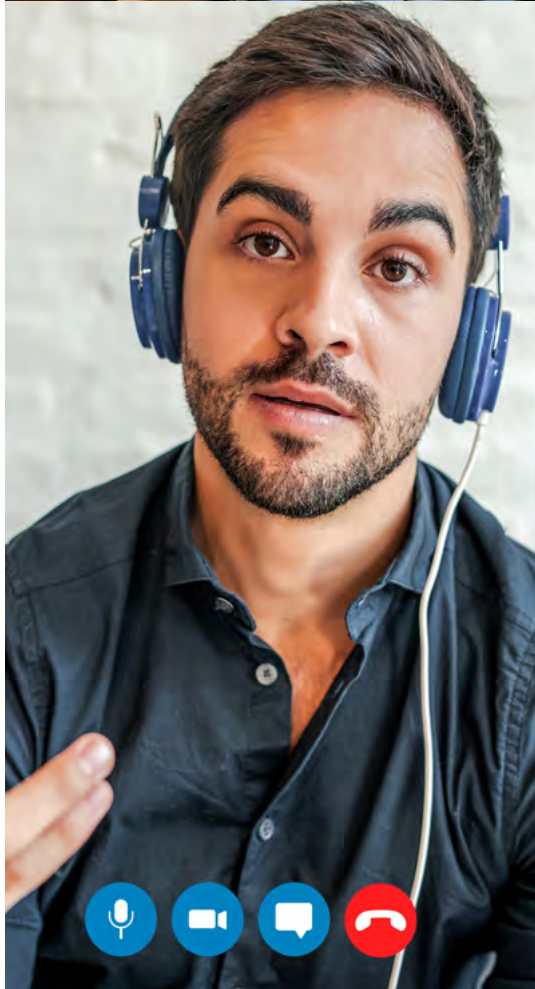
After all the uncertainty that surrounded COVID-19 – facing short-term local lockdowns and medium-term concerns around participant behaviour at events - we still need to be able to have the flexibility to deliver virtual, hybrid or in-person events at short notice.

Owen James not only gives you that reassurance, but also looks to cater for the different needs of virtual and in-person participants. And this will be extremely important if you are looking to run a hybrid event.

Whilst in-person participants will come to events to get insight and knowledge, there is no doubt that they can easily get this online and the main reason they tend to participate is to network and strategise with both their peers and your sponsors... and ultimately to do 'new' business.

It goes without saying that there is no substitute for in-person activity - particularly for driving new business. However as we all embrace this new era of digitisation, so too, do we need to digitise the event engagement.





What will it cost?

We want to keep life simple. Our fees are based on how much time we spend on your event and what assets we deliver. This is made easier by sending over a menu incorporating all available options. We will then supply a detailed quote and cost breakdown reflecting your selections.



BRANDS WE HAVE WORKED WITH

Amundi | ETF
Indexing
Smart Beta
ASSET MANAGEMENT

ALT/AVE

**CHARLES
STANLEY**

Dorsum
INVESTMENT SOFTWARE

EY

FARRER&Co

HUB FINANCIAL
SOLUTIONS

**HYMANS
ROBERTSON**

Invesco

investcloud

JUST.

LAZARD

LEGG MASON
GLOBAL ASSET MANAGEMENT

LIONTRUST

LYXOR etf

octopus

PACIFIC
ASSET MANAGEMENT

PIMCO

**POLAR
CAPITAL**

Ruffer

Schroders

**SQUARE
MILE**

WINTON

WHAT OUR CLIENTS SAY

Octopus have worked with Owen James running quarterly Breakfast Briefings for a number of years. Their attention to detail and organisational skills are great but equally impressive is their contact list of senior figures within Financial Services. We have been consistently impressed with the calibre of attendees they have been able to bring to our events and also those attending their own Meeting of Minds.

Head of Wealth Management, Octopus

This was our first event working with Owen James and I can confidently say we achieved our objectives and some! The team at Owen James were organised and easy to deal with, they helped to refine our agenda, source speakers and promoted the event effectively across their network. The result was a very polished and professional conference which offered attendees practical tools, lively conversation and an opportunity to network with their peers.

Head of Marketing, Charles Stanley

CONTACT



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