









Owen James - A Year of Opportunities 2019

| EVENT | DATE | LOCATION | PARTICIPANTS |
|--|---|---|---|
|  |  |  |  |
| Asset Management | | | |
| A Meeting of Minds - Asset Management | Thursday 7 March | The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL | CEO, COO and Heads of Retail Distribution from asset management with an interest in addressing current and future trends affecting their own businesses and the industry as a whole. |
| | Thursday 19 September | | |
| Financial Advisory | | | |
| A Meeting of Minds - Advisory Distributors | Tuesday 25 June 1 place left! | Tylney Hall Hotel & Gardens, Ridge Lane, Rotherwick, Hook RG27 9AZ | CEOs and the Heads of Investment Strategy for the largest advisory distributors in the UK: the nationals, networks and consolidators. The CEO stream will focus on issues around business strategy; the Heads of Investment Strategy will focus on innovative investment solutions as well as overarching trends. |
| | Thursday 28 November | The Lanesborough Hotel Hyde Park Corner, London SW1X 7TA | |
| A Meeting of Minds - Winning Advisers | Tuesday 15 October | Tylney Hall Hotel & Gardens, Ridge Lane, Rotherwick, Hook RG27 9AZ | Business Heads from independently spirited financial advisory firms which typically have between £150M and £300M Funds Under Management and 3-20 advisers. |
| Bank & Brand Distribution of Retail Financial Services | | | |
| A Meeting of Minds - Bank & Brand Distribution of Retail Financial Services | Thursday 28 March | The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL | Director level representatives from retail banking, building societies and brands who have strategic oversight of their companies' financial services and product offering. |
| | Thursday 3 October | | |
| Wealth Management & Private Banking | | | |
| A Meeting of Minds - Wealth Management & Private Banking | Thursday 13 June SOLD OUT | The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL | CEOs and the CIOs from global private banks, DFMs, MFOs and Wealth managers whose particular focus is UK. The CEO stream will focus on issues around business strategy; the CIO stream will focus on their investment strategies. |
| | Wednesday 20 November | | |
| Winning Advisers - The Regional Series | | | |
| Winning Advisers - The Regional Series | Tuesday 30 April | Rudding Park, Follifoot, Harrogate, HG3 1JH | Business heads from independently spirited financial advisory firms. |
| | Thursday 2 May | Bowood Hotel, Derry Hill, Calne, SN11 9PQ | The series of events will bring together firms which typically have between £150M and £300M Funds Under Management and 3-20 advisers. |
| Wealth Management & Private Banking- Wealth Matters Roadshow | | | |
| Wealth Matters Roadshow | Tuesday 5 November | Bowood Hotel, Derry Hill, Calne, SN11 9PQ | Bringing together 25-35 fund selectors and office heads from the leading UK regional DFMs |
| | Wednesday 6 November | Stapleford Park, Stapleford, Melton Mowbray, LE14 2EF | |
| | Thursday 7 November | Rudding Park, Follifoot, Harrogate, HG3 1JH | |

Arrange a meeting to find out more:

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| Mindful of | | | |
| Mindful of - Investing in Retirement | Tuesday 14 May | The Royal College of Physicians, London NW1 4LE | Strategic heads discuss the sort of retirement investment solutions available and the pros and cons. It will also review the regulatory and political environment as well as the overarching trends affecting the client at the different stages of their lives be it in work, at retirement or in retirement. |
| Mindful of | | | |
| Mindful of - Technology in Financial Services | Wednesday 13 November | The Royal College of Physicians, London NW1 4LE | An opportunity for the Strategic/Technological/innovation heads (C-suite, Directors) from the largest FS institutions to discuss all aspects of the digital impact - be it customer journey, re-platforming through technological innovations and efficiencies and challenges facing both their businesses and the industry as a whole. |
| Quarterly Breakfast Briefings - Wealth Management & Private Banking | | | |
| Quarterly Breakfast Briefings Chief Financial Officers (CFO) | Thursday 17 January | The Offices of EY 1 More London Place, London, SE1 2AF | Owen James, in association with EY, has created a platform bringing together Chief Financial Officers from the largest Wealth Managers & Private Banks for short, sharp updates on the key challenges facing their businesses. |
| | Thursday 9 May | | |
| Quarterly Breakfast Briefings Chief Operating Officers (COO) | Thursday 28 March | The Offices of EY 1 More London Place, London, SE1 2AF | Owen James, in association with EY, has created a platform bringing together COOs from the largest Wealth Managers & Private Banks to explore topics such as how they can manage cost income ratios more effectively; best of breed outsourcing; how to keep the regulator happy; and provide a high quality service. |
| | Thursday 27 June | | |
| Quarterly Breakfast Briefings Focus on Philanthropy | Thursday 24 January | The Offices of EY 1 More London Place, London, SE1 2AF | Owen James, in association with EY, has created a platform bringing together Business Heads, Head of Philanthropy and Heads of Portfolio Management from the largest Wealth Managers & Private Banks for regular updates and discussions on issues relating to philanthropy. |
| | Thursday 23 May | | |
| Quarterly Breakfast Briefings Distributors of Human Resources | Tuesday 21 May | The Offices of Farrer & Co, 66 Lincoln's Inn Fields, London WC2A 3LH | Owen James, in association with Farrer & Co and Alchemy has built a platform bringing together HR Directors from the largest Wealth Managers & Private Banks for regular updates and discussions on issues relating to recruitment, remuneration, retention; and leadership. |
| Quarterly Breakfast Briefings Heads of Wealth Planning | Thursday 24 January | The offices of Octopus Investments, 33 Holborn, London EC1N 2HT | Owen James, in association with Octopus Investments, has built a platform bringing together Heads of Wealth/Financial Planning for regular updates on the issues which affect their day to day. These briefings explore topics such as regulation, the client journey/ interface, the impact of different technology and tax issues - all in the quest of providing the best possible customer outcomes. |
| Wealth Management & Private Banking - Europe | | | |
| A Meeting of Minds - Wealth Management & Private Banking | Spring 2020 | Steigenberger Frankfurter Hof Am Kaiserplatz, Frankfurt, Germany | CEOs and the CIOs from global private banks, DFMs, MFOs and Wealth managers whose particular focus is mainland Europe. The CEO stream will focus on issues around business strategy; the CIO stream will focus on their investment strategies. |
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Want to connect with the key decision makers within the industry? Have a new product to launch? Owen James events offer an unparalleled platform to increase brand awareness and network with peers.

Arrange a meeting to find out more:

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