



Owen James - A Year of Opportunities 2020

EVENT	DATE	LOCATION	PARTICIPANTS
			
Thematic events - NEW for 2020			
WealthTech Matters - The Series	The Client: 10 March	Rise London 41 Luke Street Shoreditch EC2A 4DP	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 Adviser: 24 September		
	The Business: 11 November	The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL	
Targeting Retail Banks & Brands			
A Meeting of Minds - Bank & Brand Distribution of Retail Financial Services	Thursday 8 October	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.
Targeting Financial Advisers			
A Meeting of Minds - Advisory Distributors	Thursday 17 September 3 places 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 26 November 1 place left!	The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL	
A Meeting of Minds - Winning Advisers North	Thursday 8 October 1 place left!	The Grand, Station Rise, York YO1 6GD	Regional Business Heads from independently spirited financial advisory firms which typically have between £150M and £300M Funds Under Management and 3-20 advisers.
A Meeting of Minds - Winning Advisers South	Thursday 15 October	Tylney Hall Hotel & Gardens, Ridge Lane, Rotherwick, Hook RG27 9AZ	
Paraplanning Excellence	Tuesday 17 November	Schroder's Offices I London Wall Place, London, EC2Y 5AU	Paraplanners, analysts and technical support who support advisers within the financial advisory industry.
Targeting Asset Managers			
A Meeting of Minds - Asset Management	Thursday 5 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 17 September		

Arrange a meeting to find out more:

E jamesgoad@owenjamesgroup.com T 01483 861334

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Targeting Wealth Managers & Private Banks			
A Meeting of Minds - Wealth Management & Private Banking	Thursday 10 September 2 places left!	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.
	Thursday 19 November		
Regional Roadshow			
Wealth Matters Roadshow	November tbc	Ellenborough Park, Southam Ln, Cheltenham GL52 3NJ	Bringing together 25-35 fund selectors and office heads from the leading UK regional DFMs
		Stapleford Park, Leicester, LE14 2EF	
		Rudding Park, Rudding Ln, Follifoot, Harrogate HG3 1JH	
Quarterly Breakfast Briefings			
Quarterly Breakfast Briefings Chief Financial Officers (CFO)	January May September	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.
Quarterly Breakfast Briefings Chief Operating Officers (COO)	March June September December	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.
Quarterly Breakfast Briefings Focus on philanthropy	January May September	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.
Quarterly Breakfast Briefings HR Directors	January May September	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	March June September December	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.

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