









Owen James - A Year of Opportunities 2021

EVENT	DATE	LOCATION	PARTICIPANTS
			
Thematic events			
WealthTech Matters - The Series	The Client: 11 March	Rise London 41 Luke Street Shoreditch EC2A 4DP	Covid-19 has driven a rapid digitalisation of wealth management business models. This series will examine what comes next. Each iteration will focus on the different key elements of your business: your clients, your relationship managers and your overarching business model. Owen James and The Wealth Mosaic collaborated to create a series of triannual events for key decision makers from the Private Wealth industry - COOs, CTOs and their teams.
	The Adviser: 17 June		
	The Business: 11 November		
Targeting Retail Banks & Brands			
New for 2021 Virtual Verticals	March 2020	Roundtable events hosted online	Director level representatives from retail banking, building societies and brands who have strategic oversight of their companies' financial services and product offering.
A Meeting of Minds - Bank & Brand Distribution of Retail Financial Services	Thursday 7 October	The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL	
Targeting Financial Advisers			
A Meeting of Minds - Advisory Distributors	Thursday 24 June	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 25 November	The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL	
A Meeting of Minds - Winning Advisers North	Thursday 29 April	The Grand, Station Rise, York YO1 6GD	Regional Business Heads from independently spirited financial advisory firms which typically have between £150M and £700M Funds Under Management and 5-20 advisers.
A Meeting of Minds - Winning Advisers South	Thursday 14 October	Tylney Hall Hotel & Gardens, Ridge Lane, Rotherwick, Hook RG27 9AZ	
Paraplanning Excellence	November tbc	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			
New for 2021 A Meeting of Minds - Asset Management - The Series	21 January other dates tbc	Quarterly briefings - locations tbc	This series brings together the CEOs and COOs from leading asset management firms with an interest in addressing current and future trends affecting their own businesses and the industry as a whole.

Arrange a meeting to find out more:

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Targeting Wealth Managers & Private Banks			
A Meeting of Minds - Wealth Management & Private Banking	Thursday 10 June	The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL	This series brings together the CEOs and the CIOs from global private banks, DFMs, MFOs and Wealth managers whose particular focus is UK.
	Thursday 18 November		
Regional Roadshow			
Wealth Matters Roadshow	Dates 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		<i>A blend of virtual and in person events held at:</i>	
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.
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.
Breakfast Briefings Focusing 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.
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 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.
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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