

## Feedback received from our Autumn 2020 virtual events Meeting of Minds and WealthTech Matters...

- **Meeting of Minds Wealth Management and Private Banking – 10 September**

*'Seamless digital experience driven off an exceptional app'* - CIO, Credo Wealth

*'First time I attended and found it very useful and good use of time with good quality speakers and participants'* - Chief Executive, Murray Asset Management

*'Nowhere else can you find the breadth of experience and depth of knowledge as a MOM roundtable'* - Investment Director, Tilney Group

*'The most intelligent forum for Wealth Management leaders'* - Partner, Smith & Williamson

*'First class presenters and topics, plus I thought you organised the virtual format exceptionally well. Triumph in the face of adversity!'* - Partner & Head of Private Clients, Sarasin

- **Meeting of Minds Advisory Distributor – 17 September**

*'Many thanks...It was certainly a different challenge for us all today'* - Communications Director, AKG Financial Analytics

*'Great opportunity to pause, reflect and share ideas. Particularly important during such uncertain times'* - Managing Director, VouchedFor

*'I will admit I wasn't that sure how it would be but it was great, round tables worked really well'*  
- Chief Client Officer, Succession Wealth

*'Very well organised event with discussion where I learnt about developments that will solve some real business problems and enhance our profits'* - Chairman, Helm Godfrey Partners

*'Meeting of Minds met the challenge of running a digital only event head on, and came out on top'*  
- Managing Director, Willis Owen

*'Well done all at Owen James! An excellent conference'* - Head of Advisory Distribution, Goldman Sachs Asset Management International

*'I thought it was really good and I have done a lot of virtual events this year, far more interactive than others and better tech! Well done all!'* - Executive Director, Goldman Sachs Asset Management International

*'Always great to see and hear from peers, there is nowhere that does this better than MOM'*  
- Senior Partner, The Private Office

*'Always a pleasure working with this astute group of professionals! Best conference in the industry (and I mean globally)!'* - Managing Director, Business Strategy, Goldman Sachs Asset Management

- **Meeting of Minds Asset Management – 17 September**

*'An enjoyable condensed forum on topical subjects for asset managers' - Chief Operating Officer, Genesis Investment Management*

*'I do look forward to when we can all be meeting face to face again but a great effort to keep MOM going in a virtual world' - Managing Director, Seven Investment Management*

- **WealthTech Matters – The Adviser – 24 September**

*'The best managed experience & opportunity to virtually network with our peer group I have seen so far in 2020' - COO, Stonehage Fleming*

*'Really insightful event and managed incredibly well despite being virtual. Liked the mix of keynotes and roundtables - the best virtual event I have attended so far' - Head of Change, Saunderson House*

*'A very useful forum for hearing from and contributing to the shared experiences of business leaders in the world of finance and investment advice, all of whom share a passion for the advancement of technology to achieve better outcomes for providers of financial solutions and their clients.' - Head of Business Development, PI Investment Management*

- **A Meeting of Minds Bank & Brand Distribution of Retail Financial Services – 8 October**

*'I really hope we can all get together in person next time – but well done, for making it work virtually – which is no mean feat!' - Head of Financial Services & Travel Partners, Manchester United Football Club*

*'A really enjoyable experience with some great learnings to take away' - Head of Product Management, Al Rayan Bank*

*'Great example of bringing together people across the industry to improve the reputation, collaboration and ultimately the experience that our customers have. To run an event like this in the current climate was a great success. I will be back for future ones' - Mortgage Director, Home Buying Ownership, NatWest Group*

*'Lovely to see and chat with real people with the same interests! Reassuring that we're experiencing the same things and that no-one has a crystal ball!' - Senior Marketing Manager – Savings, Cambridge and Counties Bank*

*'A superbly modern take on a networking event held in the midst of a pandemic! Superb use of modern tech to help facilitate what was a very useful, insightful and worthwhile event' - Financial Services Director, Embrace Financial Services*

*'Great mix of speakers and guests as always!' - Top Tier Propositions Director, HSBC Bank*

*'I valued each of the sessions that I was in - it was good to get the views and insights of the other participants' - Chief Executive Officer, Saffron Building Society*

*'Nothing I would change. You guys did a fantastic job given the current circumstances' - Business Development Director, Compare the Market*

- **A Meeting of Minds Winning Advisers North – 8 October**

*'It's always interesting to sit on a roundtable and see what your peers are doing. Owen James facilitates this efficiently and you get value for your time'* - CEO, Blackstone Moregate

*'Despite obvious challenges a useful and thought-provoking event'* - Director, St Edmundsbury Financial Services Ltd

*'Very well run, well done!'* - Director, Sheards Wealth Management Ltd

*'Well worth investing your time in such an event. Informative and relevant to the industry we work in. Helpful and supportive.'* - Director, Octagon Financial Services Limited

*'I always come away from this brimming with ideas and plans'* - Managing Director, Warwick Financial Solutions Limited

*'I have been attending the Winning Advisers event for several years. Well done Owen James. What we lost in the physical reality was made up for in the professionalism of the Owen James team and their sponsors, both before and after the event and it made the virtual reality an excellent conference to attend.'* - Partner, Access Wealth Management

*'Overall it was an enjoyable and worthwhile event. Whilst online meetings can never replace the conference meeting experience, I thought that the Meeting was well organised and generally well presented. Well done! And Thank you'* - Director, Advisa Group

*'Well worth taking time out of the business schedule to listen to other firms in a safe environment. Well organised and executed.'* - Director, True bearing

*'Accepting that we would all rather be there physically I think it worked well. Must have been very hard work pulling all that together, so congrats to you all.'* - CEO, Joseph Lamb

*'A really useful morning.'* - Investment Committee Member, Alan Boswell

*'Subject matter was relevant and concise, making the morning a really good use of time.'* - Managing Director, Taylormade Financial Planning

- **A Meeting of Minds Winning Advisers South – 15 October**

*'A very useful event with which to obtain industry knowledge as well as best practice from similar organisations and business owners within our industry. The Events are extremely well organised and targeted to relevant topics within our industry and the broader economy at the time of presentation. I do not normally enjoy these types of event but I found there to be plenty of value in attending and I would look to attend another event in the future.'* Director, Investment Solutions WM

*'So good to be treated as intelligent attendees and not talked to in a 'dumbed down' presentation. Another enjoyable day at an Owen James conference. Thank you for all that you do for the delegates.'* Director, Covenham Financial Services

*'Yet another great and informative event, despite the challenges of on-line session. Great Job!'* Director, Generation Financial Services

*'A great day as always. The 'virtual format' worked well too although I much prefer the normal 'in person'*

event'. Managing Director, Map Financial Ltd

'It must have been a challenge to arrange but the zoom sessions/interaction worked well throughout the day and it ran to time which was quite an achievement given the remote nature'. Managing Director, Crowe Financial Planning

'A very useful day. Lots of good, open and honest discussion. A big thank you to your team and to the sponsors for today's sessions. I look forward to being face to face again but in the meantime these online sessions have gone really well and have been a tonic'. Director, Grosvenor Wealth Management

'Many thanks again for such a well-run and professional day – you and the team did a superb job'. Chief Commercial Officer, Multrees

- **WealthTech Matters – The Business – 11 November**

'An engaging and informative session once again. Well organised, relevant and well delivered. A good use of my time. Thank you.' Director, Grosvenor Wealth Management Ltd

'A thank you goes out to the organisers of WealthTech Matters. The content presented was highly relevant to the industry, and the perfect forum for discussing the challenges facing all wealth managers. I enjoy these sorts of events, as it allows me to listen and interact with the thought leaders of our industry'. Partner & Chief Operating Officer, Whitefoord LLP

'I really enjoyed the sessions. The topic areas were particularly relevant and the facilitators did a good job of feeding information into each session and people's comments and ideas were very informative'. Chief Operating Officer, RBC Wealth Management International

'A really useful morning but the opportunity to hear from others in the roundtables particularly so'. Associate Director, Bordier & Cie

- **Meeting of Minds Wealth Management and Private Banking – 19 November**

'An excellent format for the new reality post COVID' Head of Private Banking UK, Intesa Sanpaolo Private Banking

'A Meeting of Minds is the one event I choose to attend above all others.' Managing Director and COO, Hassium Asset Management

'A great way of keeping engaged with industry developments in real time' Partner, Private Clients, Sarasin

'An insightful few sessions with likeminded professionals faced with similar challenges. A chance to talk things through and hear another opinion and another way to approach a problem. Looking forward to the next session!' Head of Wealth Management, Handelsbanken WM

'Thought provoking and a good use of time' Chief Executive, Murray Asset Management

- **Meeting of Minds Advisory Distributor – 26 November**

*'As always, A Meeting of Minds is provocative, thought provoking and a fantastic opportunity to hear from peers'* Senior Partner/Member of Investment Committee, The Private Office

*'Owen James are the best at what they do and this has continued with the event going online. Really interesting topics with great speakers. Looking forward to attending future events'* Head of Workplace Strategic Development, Hargreaves Lansdown

*'A thoroughly worthwhile morning, with first class speakers and intelligent and informed discussion'* Board Chairman, Helm Godfrey Partners

*'Really difficult times, yet Owen James prevailed and still managed a superb set of sessions which were informative, helpful and engaging. As always, thank you.'* Business Development Director, Mattioli Woods

*'MOM always delivers. Content always relevant, current and incredibly useful'* Managing Partner, Continuum (FS) LLP

*'Really glad you converted this to a virtual event which was extremely well planned and delivered. A day well spent for me'* Managing Partner, Parkgate Financial Services LLP

*'Always a professional, seamless event, I take away something every time - look forward to it coming back as a live conference.'* Managing Director, Willis Owen

*'Always professional, always interesting. A must attend event.'* CEO, Sandringham Financial Partners

*'The nature of the virtual roundtable was much better than I anticipated. The Q&As worked well with the moderator involving many. As the shy retiring type, I genuinely found them less intimidating than the real events. Now that's a real quandary for me as I do miss the F2F networking opportunities.'* Director, RSMR