

CEO Wealth Management & Private Banking dinner VII

INNOVATIVE WAYS TO DRIVE UP REVENUE AND WEATHER GEOPOLITICAL UNCERTAINTY

Thursday 3 October 2024 (1830-2130 followed by networking drinks) – Wallbrook Club, 37A Walbrook, London EC4N 8BS

18:30-19:00	WELCOME DRINKS
19:00-19:10	WELCOME Outline the objectives of the CEO Dinner Series and recap on topics discussed at the last dinner. <i>Dave Mason, Managing Director at Solve Partners and James Goad, Managing Director at Owen James</i>
19:10-20:05	ACCELERATING REVENUE GROWTH IN WEALTH MANAGEMENT Although M&A is still rife in wealth management, there is now a greater focus on organic growth across the sector. This session we will discuss innovative strategies for CEOs to boost revenue through technology, client engagement, product diversification, and market expansion. This will include: <ul style="list-style-type: none">• What's holding us back and why is the old approach no longer working?• How do we incentivise the best behaviours and culture?• Who's getting it right and what can we learn from other industries? – Examples of firms who have achieved true sales transformation with 'sales and service' culture at its heart that is clearly reflected through its strategy, proposition and values. <i>Expert: TBC at SBR Consulting</i>
20:05-21:00	GEARING UP FOR GEOPOLITICAL UNCERTAINTY – What is the outlook and what does it mean for wealth management? You don't need to be rocket scientist to see that the world is experiencing a tectonic geopolitical shift. Whether it is plethora of elections around the world; conflict in the Palestine and Ukraine; growing tensions between the United States and China; and the threat of future pandemics. All this uncertainty, volatility and geopolitical fragmentation will have profound impact on investor behaviour and wealth management. During this session we will discuss what strategies Wealth Managers and Private Banks are adopting during these uncertain times (both here and further afield). <i>Expert: James Ashley, Chief Market strategist and Managing Director (Head of International Market Strategy & Head of Strategic Advisory Solutions) at Goldman Sachs</i>
21:00-21:30	THANK YOU FOLLOWED BY NETWORKING DRINKS – Key conclusions

DinnerBriefing

What is the context of these Briefings?

We are delighted to have been asked to relaunch this series of bi-annual dinners targeting the Chief Executive Officers from the leading private banks and wealth managers. The idea is to provide a platform for CEOs and their peers to strategise together about the biggest challenges facing their business and the industry and ultimately try to find ways in which we can collaborate to drive change forward.

Participant List

- **Arbion Limited** - *Chief Executive Officer*
- **Artorius Wealth Ltd** - *CEO*
- **Aviva** - *Managing Director for Wealth & Advice*
- **Barclays Private Bank Limited** - *Managing Director*
- **BRI Wealth Management PLC** - *Chief Executive Officer*
- **Cazenove Capital Management Ltd** - *Deputy CEO*
- **Credit Suisse (UK) Limited** - *COO - Wealth Management UK*
- **Deutsche Bank Wealth Management** - *CEO - Head of Wealth Management*
- **EQ Investors Limited** - *Joint Chief Executive Officer*
- **Kingswood** - *Chief Executive Officer*
- **MKC Wealth Ltd** - *Chief Executive Officer*
- **MWA Financial** - *Executive Chairman*
- **Sarasin & Partners LLP** - *Managing Partner*
- **Schroder Wealth Management US Limited** - *CEO*
- **Waverton Investment Management Limited** - *Chief Executive Officer*

Experts & Organisers

- **Fox Red Insight** - Gilly Green – *Founder, and Adviser at Solve Partners*
- **Goldman Sachs** – James Ashley, *Chief Market strategist and Managing Director (Head of International Market Strategy & Head of Strategic Advisory Solutions)*
- **Solve** – Donald Reid, *Chairman*
- **Solve** – Dave Mason, *Managing Director*
- **Owen James Group** – Rebecca Leitch, *Conference & Content Manager*
- **Owen James Group** - James Goad - *Managing Director*