

A Meeting of Minds: Wealth Management & Private Banking

Thursday 19 November 2020 – via Zoom

THE SCHEDULE				
0800-0830	Virtual coffee	An opportunity to network over coffee (and homemade croissants – “home” being the key word here) in small curated groups or one to ones (via Zoom rooms). You will have been invited to make your meeting choices and they will be visible in your personalised itinerary. We will ensure you know what to do!		
0830-0845	Presentation	Welcome incorporating the highlights of the Scene Setter research.		
0845-0910	Presentation	<p>A panel discussion – hear from your (possible) future investors. Your opportunity to hear from an invited panel of Oxford University interns talking about their perspectives of wealth management and financial services in the round. They may not be your current target clients but they are coming down the road and you need to be prepared to greet them with open arms. They may of course prefer to make an impact rather than a million but we believe their views may help shape your thinking around how you engage with both your future investors and indeed your future employees.</p>		
The interactive roundtables will take place over Zoom. Trust us – you will feel as at home as if you were at The Berkeley!				
0915-1015	Working Session 1	As we seek to satisfy the burgeoning demand for ESG investing, isn't it time the industry came together behind a common purpose rather than continue to jostle for position?	Growth in wealth management – where is it coming from, who is reaping the benefits and why?	Operational resilience. You might think you have proved you have it covered after the last nine months but The FCA is keen to ensure you maintain the focus.
1015-1035	Coffee	An opportunity for you to catch up on emails – grab a coffee or a “pick yourself up” smoothie – do a HIIT workout. OR stick with us and watch Companies in Motion who will teach you in a ten-minute video how to ‘Power your performance with physical intelligence. Achieve more, stress less, live and work more happily.’ Could prove useful. OR watch the keynote we ran for your COOs on how to understand more about your client experience. The link will be there.		
1035-1135	Working Session 2	A consideration of four different scenarios for the post-pandemic world.	How has Covid 19 impacted your business? What trends and opportunities can we identify from a global peer set?	ESG – A regulatory imperative.
1135-1155	Coffee	Another break to allow you to stretch your legs; watch part 2 of Companies in Motion; clear the inbox or powder your nose!		
1155-1255	Working Session 3	100 is the new 80: the new retirement frontier.	Future wealth management business models - from (A)cquisitions to (Z)oom and everything in between.	BREXIT – whether we leave with a deal or not, presumably you have a plan?

1300-1330	Presentation	Tim Shipman, Political Editor of the Sunday Times , will close this Meeting with an entertaining canter through the political landscape. He may have views on the PM's inner circle, the prospects for the UK's relationship with President Elect Biden, where we might end up with the EU post Brexit and just how soon we might be able to start shaking hands again ... but then again who knows... something else might have happened by then.
BACK TO THE "OFFICE" BEFORE RECONVENING FOR NETWORKING DRINKS AT 1700. Oh go on!!		
1700-1745	Networking	More virtual networking ... with your (own) glass in hand. We will ensure you know what to do!