

Owen James - Calendar of Events 2020

EVENT	DATE	LOCATION	PARTICIPANTS
			
Thematic event - cross industry - NEW for 2020			
A Meeting of Minds for Women within Wealth and Asset Management	Tuesday 5 May	The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL	A content rich environment encouraging director level women within wealth and asset management to take time out to address strategic issues affecting their businesses and their roles within them.
Thematic event - cross industry			
WealthTech Matters - The Series	10 March 18 June 24 September	Rise London 41 Luke Street Shoreditch EC2A 4DP	Each event will cover different industry concerns and themes including Client Engagement Tech, RegTech, Outsourcing and Infrastructure and will bring together COOs, CTOs and their teams.
A Meeting of Minds - Technology in Financial Services	Wednesday 11 November	The Royal College of Physicians, London, NW1 4LE	An opportunity for the Strategic/Technological/innovation heads (C-suite, Directors) from the largest FS institutions to discuss all aspects of the digital impact - be it customer journey, re-platforming through technological innovations and efficiencies and challenges facing both their businesses and the industry as a whole.
Targeting Retail Banks & Brands			
A Meeting of Minds - Bank & Brand Distribution of Retail Financial Services	Thursday 26 March	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.
	Thursday 8 October		
Targeting Financial Advisers			
A Meeting of Minds - Advisory Distributors	Thursday 25 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 26 November	The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL	
A Meeting of Minds - Winning Advisers North	Thursday 30 April	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 3 November	Schroder's Offices 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		

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Targeting Wealth Managers & Private Banks			
A Meeting of Minds - Wealth Management & Private Banking	Thursday 11 June	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	Tuesday 28 April	Ellenborough Park, Southam Ln, Cheltenham GL52 3NJ	Bringing together 25-35 fund selectors and office heads from the leading UK regional DFMs
	Wednesday 29 April	Stapleford Park, Leicester, LE14 2EF	
	Thursday 30 April	Rudding Park, Rudding Ln, Follifoot, Harrogate HG3 1JH	
Quarterly Breakfast Briefings			
Quarterly Breakfast Briefings Chief Financial Officers (CFO)	Thursday 16 January	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.
	Thursday 14 May		
Quarterly Breakfast Briefings Chief Operating Officers (COO)	Thursday 26 March	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.
	Thursday 25 June		
Quarterly Breakfast Briefings Focus on Philanthropy	Thursday 23 January	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.
	Thursday 7 May		
Quarterly Breakfast Briefings HR Directors	Thursday 30 January	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	Wednesday 25 March	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.

Want to connect with the key decision makers within the industry? Have a new product to launch? Owen James events offer an unparalleled platform to increase brand awareness and network with peers.

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