

**NEW FOR 2025**

Partner with  
Owen James to build  
meaningful campaigns  
that maximise your  
distribution



**EVENTS**

**MARKET INSIGHT**

**RESEARCH**

**CONTENT CREATION**

# We are evolving and revisioning the way we work

For nearly 20 years, Owen James have been hosting prestigious events that have brought together strategic heads from the largest distributors across the financial services landscape to strategise with each other.

**The objective has always been to create a platform for change at a business and industry level, and enable you to influence your biggest buyers.**

Historically engagement with Owen James has always been event driven, but we are revisioning the way we work, creating richer partnerships. Whether you are looking to; grow your distribution, build your brand awareness, position yourself as a thought leader, understand your target market, or launch new products, Owen James would love to partner with you to create the perfect campaign that leverages off our events, data, content and resource.

## Owen James Events Portfolio

a meeting of  
MINDS

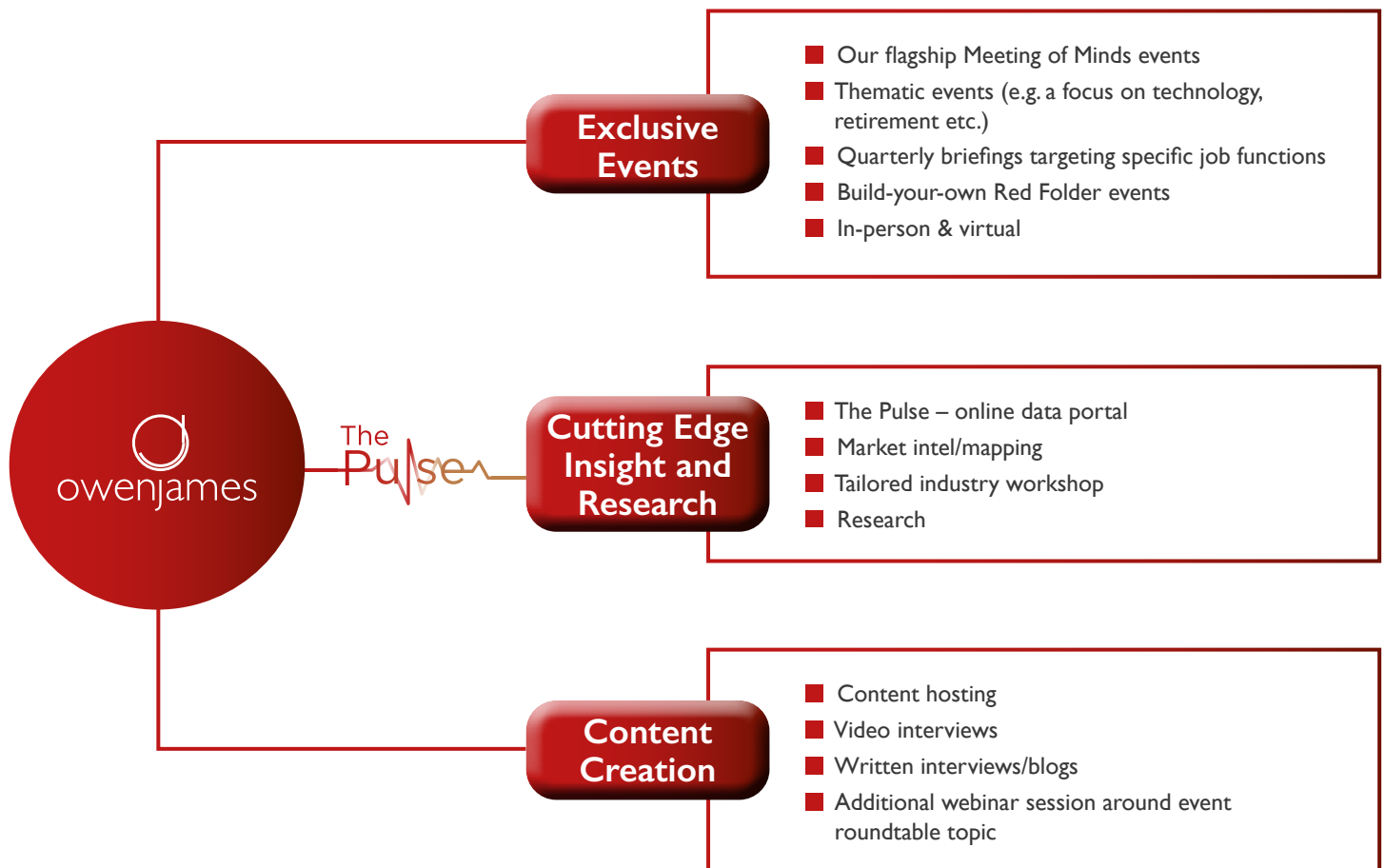
WEALTH  
TECH  
MATTERS

RETIREMENT  
MATTERS



## Owen James Events Membership

Owen James is launching a subscription model. Partner with us for at least two years, and we will plug you into key buyers and a wealth of data and content.



## Key Benefits – what this means for you...

- On demand data and market insights
- Enhanced ROI and exclusive membership rates
- Access to key decision makers through premium events
- Brand exposure through bespoke content

# Membership Packages

Please note discounts are available to those that sign up to a subscription/membership package\*.

	PRODUCT	DETAILS		COSTS Excl. VAT	
				The Pulse	Event Only
EVENTS	Meeting of Minds Wealth Management and Private Banking	12 June & 13 Nov	3pp 2pp Networker	£20,010 £13,500 £8,250	£26,680 £18,000 £11,000
	Meeting of Minds Gatekeepers	20 March & 16 Oct	3pp 2pp Networker	£22,500 £16,500 £9,375	£30,000 £22,000 £12,500
	Meeting of Minds Winning Advisers (northern focus) Meeting of Minds Winning Advisers (southern focus)	22 May 9 Oct	3pp 2pp Networker	£21,000 £15,000 £9,375	£28,000 £20,000 £12,500
	Meeting of Minds Mortgage	29 April	3pp 2pp MortgageTalk Networker	£11,250 £7,500 £7,500 £4,500	£15,000 £10,000 £10,000 £6,000
	WealthTech Matters The Series WealthTech Matters Switzerland	13 March & 23 Oct 6 Nov	4pp (headliner) 2pp (roundtable) 2pp (TT / panel) 1pp (networker)	£13,612.50 £9,375 £9,375 £5,250	£18,150 £12,500 £12,500 £7,000
	Retirement Matters	2 Oct	3pp (RT) 2pp (RT) Networker	£19,057.50 £12,705 £8,437.50	£25,410 £16,940 £11,250
	Meeting of Minds Paraplanning	22 May		£13,500	£18,000
	Red Folder Briefing	Location subject to requirements		£12,000	£16,000

	PRODUCT	DETAILS	COSTS Excl. VAT	
			The Pulse	Individually
INSIGHT & RESEARCH	The Pulse	Online, interactive portal providing insights on the biggest themes impacting the distribution landscape	£8,000	£8,000
	Market Mapping	Overview of community information, reviewing your data, identifying gaps and the key players	£7,500	£10,000
	Industry Workshop	Internal meeting with your team to analyse data, market map and identify key clients	£3,000	£4,000
	Targeted Research	Opportunity to ask question/s in Scene Setter - pre-event questionnaire	£1,875	£2,500

	PRODUCT	DETAILS	COSTS Excl. VAT	
			The Pulse	Individually
CONTENT CREATION	Content hosting	On the website	£1,125	£1,500
	Two-hour video	Interview session on topic of subscriber's choice	£2,625	£3,500
	Written interview	Edited and published online	£750	£1,000
	5 questions with	Short written interviews - we ask the subscriber 5 questions on a topic, they provide	£562	£750
	Webinar session	Exploring event roundtable topic in more detail	£6,000	£8,000
	Social media post	One post on Owen James social media platforms	£375	£500

\*The Pulse discount applies to two year agreements or more only

There is lots to discuss,  
so do get in touch with the  
team to find out more.



James Goad:  
+44 (0)1483 862 691  
[jamesgoad@owenjamesgroup.com](mailto:jamesgoad@owenjamesgroup.com)



Daniel Gilmore  
+44(0)1483 862 692  
[danielgilmore@owenjamesgroup.com](mailto:danielgilmore@owenjamesgroup.com)



Nick Waugh:  
+44 (0)1483 862 693  
[nickwaugh@owenjamesgroup.com](mailto:nickwaugh@owenjamesgroup.com)