



# The Pulse

A digital, interactive portal providing insights on the biggest themes impacting the distribution landscape.

Owen James Events quantitative and qualitative research.

Keeping your finger on the pulse...

# Why now?

## What is The Pulse?

For the past 18 years, Owen James has 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** among key influencers at a business and industry level.

To help facilitate this **quantitative research** (the Scene Setter) is undertaken before each event to inform us of the **biggest themes impacting each community**. This then sets the tone for the strategic conversations within the sessions and ensures they don't descend into a talking shop.

Following each event, we compile a comprehensive summary of the roundtable discussions - our qualitative research. The combination of these insights has resulted in a rich library of data that spans nearly two decades.

**This library is now an interactive platform, called**

The  
Pulse



# Who is The Pulse for? And what are the key benefits?

Whether you're a distributor, provider, association, regulator or consultant – The Pulse provides a fantastic opportunity to:

Ask your own questions specific to your business

Benchmark yourself against your peers (for distributors)

# The Pulse

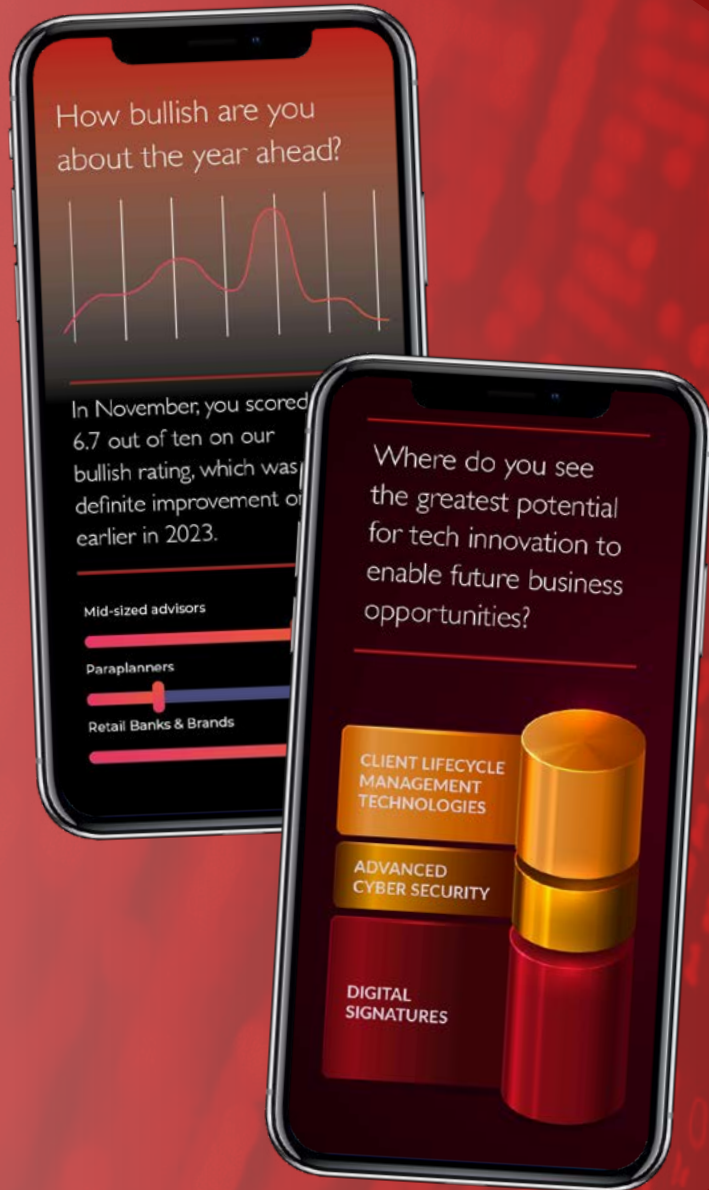
Understand the key themes impacting the market

Get a vision of the future and where you should be focusing

See how thinking varies across different communities and geographies, and how it has evolved over time

Ensure your distribution and marketing strategy is aligned





# How will it work? What will it look like?..

The digital platform will give you access to the following – allowing you to get to know the distributors better and see results in real time:


- 1 Barometer**  
How bullish is the market\*
- 2 What's keeping them up at night**
  - The big picture\*
  - Drilling into specific topics\*
- 3 SWOT**
  - Strengths
  - Weaknesses
  - Opportunities
  - Threats
- 4 What's hot**  
\*\*Highest ranked topics and key findings
- 5 Partnerships made in heaven**  
What are they looking for from providers
- 6 Sponsor/ Event specific**  
\*\*Brand awareness, Session scores\*\* & selections

\* Opportunity to segment by geography, history and community

\*\* Opportunity to segment by community

# Where does this data originate from?

Data sourced over 5 years gathered from...




**Scene Setter Data**  
Taken from the quantitative research our participants complete pre-event



**Roundtable Selections**  
What are the most popular sessions, hot topics



**Behavioural Patterns**  
How do each community rate sessions, how has this changed over time?



**Polling Data**  
Taken from all our events drumming into specific detail and outcomes



**Post Event Findings**  
Whitepaper summaries from all events (displayed by subject)

Giving you the knowledge and power...

**Market Insights**

**Future Thinking**

**Shared Learning**

**Strategic Alignment**

**Segmentation**

**Benchmarking**



# What does it cost?

£8K

For two licenses  
(at a corporate level)

Providers signing up for a  
'recurring campaign package'  
will be eligible to a  
25% discount on events

£1K

For each additional license

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

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