ADVISOR

CISI
CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

LONDON
BARRON'S LONDON SUMMIT

WHEN

17 October 2018
12:00 pm–6:00 pm

WHERE

The News Building
1 London Bridge
London SE1 9GF

RSVP

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We are delighted to announce that Barron's Advisor, supported by the Chartered Institute for Securities & Investment (CISI), will bring its Wealth Management Ranking to the UK later this year. The ranking will be conducted with the highest possible levels of journalistic process and integrity, consistent with the editorial history of Dow Jones and *The Times*, where the results will be published.

The intent is to shine a positive spotlight on some of the very best practitioners within the UK market and to provide investors with a sense of the level of quality advice that is available.

As a means of introducing the Top Wealth Manager ranking, Barron's Advisor is hosting a unique event for the top tier of UK wealth managers. This is a terrific opportunity for you to hear from the top ranked wealth managers from the US and beyond.

12:00 pm-1:00 pm
Registration and Lunch

1:10 pm–2:00 pm
Strategic Vision: Insights From Top US Advisers

Deborah Montaperto, Morgan Stanley Private Wealth Management
Spuds Powell, Kayne Anderson Rudnick LLC
Moderator: **Sterling Shea,** Global Head, Dow Jones Wealth & Asset Management

Two top ranked US advisers will share insights on how they are evolving and adapting their approaches to create better client outcomes and sustained growth in their business. Conversation topics will include how to strategize your business plan, team structure, client service, and investments in an unpredictable market.

2:10 pm–2:40 pm
Empirically Analysing Your Practice—The Barron's Methodology

Matt Barthel, Executive Editor, Dow Jones Wealth & Asset Management

Pursuant to Barron's Advisor embarking on a project to rank the top wealth managers in the UK market—which will publish as a special report in *The Times* of London in 2019—Matt will explain our approach and philosophy for empirically analysing adviser's businesses to create our rankings. He will share his process of examining assets, revenue, and quality of practice metrics to ascertain the long-term success and scale of a given advisery business.

2:40 pm-3:10 pm
Networking Break

3:10 pm–4:00 pm
Globilisation—Where Are We Now?

Martyn Hole, Equity Investment Director, Capital Group

Globalisation is entering a new chapter. Changing patterns of global trade, innovation and digital disruption are opening up new opportunities for global investors. Are investors ready for this new era of globalisation? How can they capture big trends and future proof their portfolios?

4:10 pm–5:00 pm
Trends in the US Wealth Management Marketplace

Sterling Shea, Global Head, Dow Jones Wealth & Asset Management

Sterling examines the critical trends influencing the development of the wealth management industry. The presentation will focus on the adjustments and strategic shifts successful US advisers are making in order to bolster momentum and deliver better and more viable outcomes.

5:00 pm–6:00 pm
Cocktails and an opportunity to meet members of Barron's Advisor management and network with top tier wealth managers in the UK.

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