Virtual event | Thursday, 23 October 2025

Time	Subject Matter	Speaker
08h55	Welcome and opening remarks	**Kevin Hinton** The Collaborative Exchange
09h00	Consolidation in Wealth Management - Mergers and acquisitions in UK wealth management is hot right now • Whether this is larger firms acquiring to scale up or expand their propositions or consolidators gathering up smaller firms to amass assets, buying and selling activity has reached unprecedented levels - and does not seem to be slowing • What does this mean for the UK wealth management landscape and – in response to the FCA’s focus on “prudent” consolidation – how might this benefit the consumer? • What is the shape of these transactions, key challenges and mistakes, what “good” looks like?	**Caroline Deutsch** SEI Financial Services
09h45	An interview with James Rainbow – CEO of St James's Place Wealth Management Plc (UK)	**Philip Robotham** Schroders **James Rainbow** St James's Place Wealth Management Plc
10h15	Comfort break	
10h30	What can SA financial advisors learn from their counterparts in other countries about the business of financial planning • Succession planning and scale are core themes • What specific changes did we make to our businesses to improve succession and business efficiency? • What we would do differently if we were starting a financial advice business today	**Dominic Basilea** Aqua Wealth Management (UK) **Diarmuid Corcoran** Chartered Capital Financial Planning (Ireland) **Jon Doyle** Juniper Wealth Management (UK) Moderator: **Tyrone Brand** PortfolioMetrix
11h15	How ethics play a role when considering partnering with another business • How do you typically measure and evaluate the ethics of a potential business partner? • What warning signs should you look out for?	Fireside chat: **Martin de Kock** Ascor Independent Wealth Managers **Olwethu Masanabo** BDO Wealth **Craig Kiggen** Consolidated Wealth Group Moderator: **David Kop** FI Consult
11h45	AI agents are here: Think differently about how technology will shape your practice and financial advice into the future • Are financial advisors underestimating the impact of AI (Generative and Agentic AI is here already)? • Are clients becoming more informed and are we ready for their tough questions? • Are financial advisors genuinely investing (capex and/or opex) into capabilities to leverage new technology and fend off competitors? • Are we building technology to integrate a better understanding of our clients and their needs? • In which parts of a Financial Advice Practice have we seen the most benefit from AI?	**Mike Galloway** Adviceworx
12h15	Beyond the benchmark: The alpha of human advice in a digital age • Exploring the habits, processes and planning disciplines that define true advice excellence • How top advisors consistently deliver value by aligning advice to long-term goals, managing behavioural risk, and ensuring technical soundness across all parts of the planning process	Fireside chat: **Rivonia Govender** GrowthHouse

12h45	Comfort break	
13h30	A conversation with Millennials/Gen Y and Gen Z • What we think of the financial services industry • Where do we get our advice from? • What could the industry do more of to appeal to our generations?	**Conrad Spedding** KPC Brokers **Luvhani Makoni** Standard Bank Moderator: **Kevin Hinton** The Collaborative Exchange
14h00	Change is happening and it demands reinvention • Changing client dynamics, demographics and international wealth transfer • Advise remains key but the way value is added needs to adapt	**Elton James** Glacier by Sanlam
14h30	A conversation with a global Finfluencer • My story as a Finfluencer • What response does a Finfluencer get from clients? • The type of clients I reach and their response • How I would take advantage of social media if I was a financial advisor	**Carla Venter** Money with Carla
15h00	Building a future-ready financial advice business • What are successful businesses doing to ensure their ongoing success? • Digital innovation, mounting regulations, heightened competition and demographic shifts • Industry complexity and legacy technology. How we navigate these	Fireside Chat **Guy Holwill** Fairbairn Consult **Alec Riddle** Private Wealth Management Moderator: **Tiaan Herselman** Old Mutual Wealth
15h45	Closing comments / Conference closes	**Kevin Hinton** The Collaborative Exchange