



SPEAR'S
WEALTH | BUSINESS | CULTURE | LIFE

WEALTH
INSIGHT
FORUM 2019

THE £1 BILLION MEETING OF MINDS

SPEAR'S | WEALTH INSIGHT FORUM 2019

1 Great George Street, Westminster JUNE 2019 8am – 7pm

The *Spear's* Wealth Insight Forum brings together in excess of £1 billion of investor assets through HNW and intermediary attendees, based on *Spear's* estimates of previous events

A DAY OF INSIGHT

Commencing at either breakfast or 10am with two/three panels before a networking/vertical lunch; followed by two/three panels after lunch and networking drinks/canapés.

ABOUT THE WEALTH INSIGHT FORUM

Spear's will be doing what it does best – helping wealth managers, lawyers and other private client professionals to understand the world of their high-net-worth clients – with the *Spear's* Wealth Insight Forum.

Despite the already massive changes of the 21st century – from the rise of a new class of the super-rich to the destruction of established investment practices – many wealth managers are stuck with an old paradigm. *Spear's* is perfectly placed to explain the new HNW mindset and lifestyle with characteristic insight, analysis and wit. Why get involved?

Because you want to meet the super-wealthy, their closest advisers and the most important opinion-formers and thought-leaders of today, at an event which is stimulating, informative and enjoyable.

PREVIOUS SPEAKERS

Ben Goldsmith
Jim O'Neill
Dame Helena Morrissey
Stephanie Flanders
Gina Miller
James Daunt
Rhydian Lewis
Julie Meyer
Philip Mould
Sandra Davis
Faisal Rahman
Kate Shand
Dame Stephanie Shirley
Jeremy Goring
Rev Dr Giles Fraser
Michael Green
Robert Amsterdam
David Murray-Hundley
Richard Hargreaves
Kenny Schachter

PROVISIONAL FORMAT THEME: HWN BREXIT BRITAIN

8.00am Registration & Networking
8.50am Chairman's welcome by Alec Marsh
9.00am: Keynote 1: TBC
9.40am: Panel 1:
10.25am: Panel 2:
11.10am: Break (30 mins)
11.40am: The Insight Interview:
TBC (30 mins including questions).
12.10am: Panel 3: TBC
1.00pm Lunch (60 mins)
2.00pm: Key note 2: Robert Amsterdam on
geopolitical trends for HNWs
TBC (20 mins + questions)
2.30pm: Panel 4: TBC
3.15pm: Panel 5: TBC
4.00pm: Break (30 mins)
4.30pm: Panel 6: TBC
5.15pm: FINALE: Brexit and the Future
of Wealth
6.15pm: Closing remarks and Drinks and
canapés/networking
7.00pm: END

SPEAR'S | PROPOSED AGENDA

THE WEALTH PANEL

The Fintech transformation

Roundtable with top private bankers, asset managers, family offices and tech specialists. This will bring key and varied expertise to the table: in the age of Brexit, how can Fintech transform HNW portfolios and Britain's outlook.

THE PROPERTY PANEL

Market analysis/sentiment in the UK and beyond, Brexit and trends

What's moving in the market in this important investment area for UK-focused HNWs, plus the impact of Brexit, sterling's fluctuations and the health of the economy.

OFFSHORE/TAX AND TRUST PANEL

Exploring what the trends are looking toward 2020

With expert voices, a look at the UK and international tax and trusts state of play.

ROBERT AMSTERDAM:

The veteran *Spear's* contributor offers his geopolitics update for HNWs. How does he see Brexit working out?

ALTERNATIVE ASSETS:

Investment and buying trends and strategies in fine wine, fine art and classic cars. What sectors of these markets are 'hot', which segments are rising and who are the hungriest buyers?

INVESTMENT-MIGRATION IN THE AGE OF BREXIT

With Brexit now in play, where are UK HNWs looking for residency or second passports? And who is coming to the UK? Which jurisdictions are most attractive to globally mobile HNWs? Our expert panel will review the locations and the trends.

FAMILY LAW PANEL

From prenups to postnups to 'no fault divorce' and the end of so-called 'ticket for life' maintenance allowance and, Brexit, we probe the trends in family law for our UK-focused but increasingly international HNW community of readers.

HNW HEALTH

This panel will look at the latest trends in HNW healthcare and mental wellbeing.

PHILANTHROPY/IMPACT INVESTMENT

From impact investing to social enterprises, ethical investing, DAFs and more, we look at the trends in philanthropy. Panel could have advisers, tax experts, social entrepreneurs, philanthropists, and more.

ROUNDTABLE: BREXIT AND THE FUTURE OF WEALTH

Brexit has happened – and now we know what it looks like. But what impact is Brexit and the process of leaving the EU having on UK-focused HNWs, their wealth, and the future prosperity of Britain? In this panel we bring experts from across the private client field to contemplate Britain in five years' time. Brexit: for richer, for poorer.

NETWORKING • DRINKS • CANAPÉS



SPEAR'S | HOW TO GET INVOLVED 2019

HEADLINE SPONSORSHIP

£28,000

The *Spear's* Wealth Insight Forum in association with your company' whenever the event is mentioned

A representative from your company to give an introduction to the event and closing speech before the Great *Spear's* Debate

Opportunity to chair the Great *Spear's* debate with 4 key speakers led by celebrity individuals

Opportunity to have a stand in the break out area - (exact size TBC)

Exclusive sponsorship of a *Spear's* newsletter pre and post the event

Comprehensive major branding at the event and before and after in *Spear's* and on spearswms.com, including on the invitation to delegates

One full page ad or profile in event programme in a premium position

Six delegate passes

Exclusive sponsorship of all guests badges with sponsor's logo

Your company twitter handle to be included in every event tweet on the event night (subject to editorial control)

A "Foreword" in the events programme

Site skin for one week prior to the event taking place on <http://www.spearswms.com/category/wealth-insight-forum/>

500,000 ROS impressions on <http://www.spearswms.com/category/wealth-insight-forum/> until 30 days after the event has finished

An interview with your brand ambassador to be included on spearswms.com until 30 days post the event

One native article online at spearswms.com to be live on the site until 30 days post the event

PANEL SPONSORSHIP

£15,000

Exclusive sponsorship of the chosen panel and the right to have a speaker on that panel

Opportunity to give a brief introduction prior to the panel starting

Comprehensive major branding at the event and before and after in *Spear's* and on spearswms.com, including on the invitation to delegates.

Opportunity to have a stand in the break out area (exact size TBC)

Your logo to appear on <http://www.spearswms.com/category/wealth-insight-forum/> alongside your chosen panel

One native article online at spearswms.com to be live on the site until 30 days post the event

Your own dedicated Solos E-Shot sent to all attendees after the event has finished

One SOV MPU banner on <http://www.spearswms.com/category/wealth-insight-forum/> until 30 days post the event

One full page ad in event programme

Four delegate passes

STAND SPONSORSHIP

£6,000

Opportunity to have a stand in the breakout area for the duration of the forum

Full Page advertisement in the events programme

Comprehensive major branding at the event and before and after in *Spear's* and on spearswms.com, including on the invitation to delegates.

Two delegate passes



SPEAR'S | ABOUT SPEAR'S

Spear's is the multi-award-winning wealth management and luxury lifestyle media brand whose flagship magazine has become a must-read for the ultra-high-net-worth (UHNW) community.

Described as the 'Bible of the banking fraternity', with its financial services community, including the bankers, lawyers and family offices who advise the wealthy.

Through the *Spear's* Wealth Insight Forum, *Spear's* is uniquely placed to connect financial and luxury brands to this exclusive and elusive audience. By engaging with our panels on the concerns of the wealthy in the twenty-first century, your company or brand can demonstrate a forward-thinking, intelligent approach while meeting our HNW audience.

spearswms.com

SPEAR'S READERS

Spear's 62,000 readers are some of the wealthiest in the history of media:

- The average *Spear's* reader has a net worth (excluding primary residence) of £5.5 million (\$8.8 million) and an average annual income of £780,000.

- 77% of readers enjoy our range and style of articles.

- 63% think we are an authoritative source of information and analysis.

- 54% have set up their own company.
- They are philanthropists, collectors of art, wine, watches and jewellery and users of a wide range of luxury services.

According to a reader survey



“
The Michelin Guide to the wealth management industry

Julien Seveaux, Stanhope Capital

“
Spear's is for anyone who wants to make money – and keep it

Elizabeth Hurley

“
A cross between *Forbes* and *Vanity Fair*

Ben Goldsmith

“
My favourite magazine

Terence Conran

CONTACT

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SPEAR'S | READERS



Who attends?

1/3 **HNW/UHNWs**
A third of attendees of the *Spear's* Wealth Insight Forum are typically HNWs and UHNWs

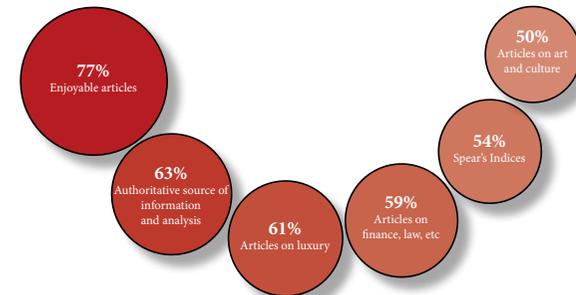
2/3 **Intermediaries & Advisers**
Two thirds of attendees to the *Spear's* Wealth Insight Forum are intermediaries, advisers and family offices

Attendees of the Wealth Insight Forum span the wealth community, covering the very rich themselves as well as their near intermediaries – family offices –and their broad network of advisers, from tax accountants and lawyers to private bankers, asset managers, and wealth managers and planners. In addition there are tastemakers in the fields of luxury.

A *Spear's* reader's average net worth (excluding primary residence):

£5,500,000

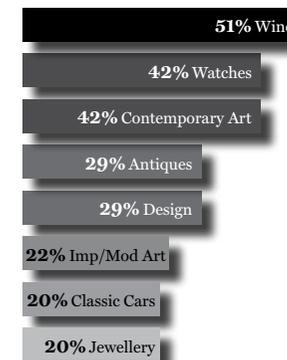
Why do people read *Spear's*?



Job title

Partner	MD	Board	Trustee	CEO	Chairman	C-suite
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What do *Spear's* readers collect? *Spear's* readers by numbers



£780,000

Spear's readers' average annual income

45

The average age of *Spear's* readers

13

Times a *Spear's* reader flies abroad for business and pleasure each year

59%

of *Spear's* readers are private donors to charity

54%

of *Spear's* readers have set up their own companies