



SPEAR'S WEALTH INSIGHT FORUM 2019

WEALTH | BUSINESS | CULTURE | LIFE

THE £1 BILLION MEETING OF MINDS

SPEAR'S | WEALTH INSIGHT FORUM 2019

Central London 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: HNW BREXIT BRITAIN

8.00am Registration & Networking
8.50am Chairman's welcome by Alec Marsh
9.00am: Keynote 1: Economics outlook
9.30am: Panel 1: Tax for HNWs
10.15am: Panel 2: Global citizenship
11.00am: Break (30 mins)
11.30pm: Key note 2: Robert Amsterdam on geopolitical trends for HNWs
TBC (20 mins + questions)
12noon: Panel 3: Wealth management
12.45pm Lunch (60 mins)
1.45pm: The Insight Interview:
TBC (30 mins including questions)
2.15pm: Panel 4: Property outlook
3.00pm: Break (30 mins)
3.30pm: Panel 5: HNW luxury
4.15pm: FINALE: Brexit and the Future of Wealth
6.15pm: Closing remarks and Drinks and canapés/networking
7.00pm: END

SPEAR'S | PROPOSED AGENDA

08:50- 09:00

WELCOME ADDRESS

With Alec Marsh, editor of *Spear's*

09:00- 09:30

OPENING KEYNOTE ADDRESS:

HNW Economics Outlook – by a banking/media economics thinker TBC.

09:30- 10:15

PANEL ONE: HNW TAX OUTLOOK

What is the tax outlook for HNWs in 2019/20? With Brexit here and rising hostility to wealth in some quarters, what do intermediaries and HNWs need to know about for the short, medium and longer term in tax?

10:15 – 11:00

PANEL TWO: GLOBAL CITIZENSHIP

Citizenship and migration-investment in the age of Brexit, in association with Henley & Partners and Finance Malta. What are the trends in global HNW migration in 2019? A deep dive into the jurisdictions that are offering in 2019/20, plus what is the outlook for the UK and UK HNWs?

11:00 – 11:30

NETWORKING & COFFEE BREAK

11:30 – 12:00

GEOPOLITICS ADDRESS

With Robert Amsterdam, the influential international lawyer and 'billionaire's lawyer' will give his overview on the 'War on Wealth'.

12:00- 12:45

PANEL THREE: WEALTH MANAGEMENT

Wealth and wealth management in the age of Brexit: What to do in 2019 and beyond to ensure your money survives the lumps and bumps of the now.

12:45 – 13:45

NETWORKING LUNCH

13:45 – 14:15

LIVE ON-STAGE INTERVIEW: TBC

A compelling conversation with a key name talking about wealth, life, success, philanthropy and more: in 2018 the guest was James Daunt of Waterstones.

14:15- 15:00

PANEL FOUR: HNW PROPERTY OUTLOOK

When will the London prime turn the corner? Plus the return of 'land' and the impact of Brexit on UK property. Our panel of experts read the runes.

15:00 – 15:30

NETWORKING & COFFEE BREAK

15:30 – 16:15

PANEL FIVE: LUXURY FOCUS

What's happening in luxury has an impact for operators in the HNW space. *Spear's* identifies the trends.

16:15 – 17:00

FINALE: STATE OF THE NATION

Bringing together figures from private wealth, banking, luxury, business, and beyond the marquee forum of the day takes the pulse of Britain – what are the trends, what is the impact of Brexit and other forces, where's the money going – what do wealth leaders and their intermediaries need to know

17:00

CLOSING REMARKS

17:00- 18:00

NETWORKING DRINKS RECEPTIONS



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

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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

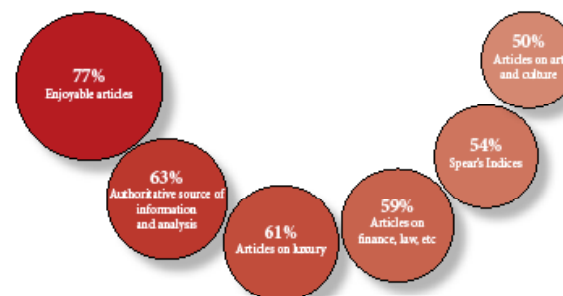
Two thirds of attendees to the *Spear's* Wealth Insight Forum are intermediaries, advisers and family offices

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

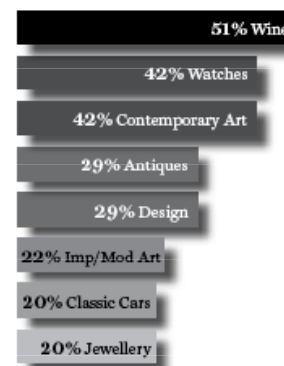
Why do people read *Spear's*?



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