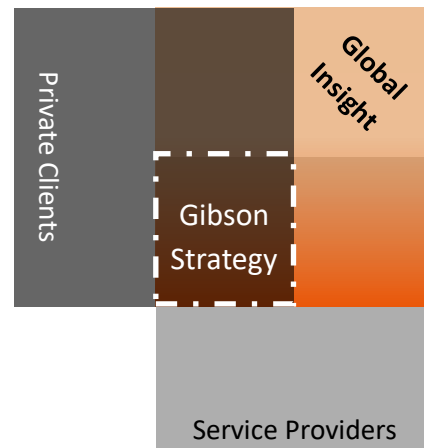


## Masterclass series

The masterclass series draws on **Dr Stuart Gibson's academic research** gathered over 14 years from an extensive private wealth universe. This population consists of private clients and private wealth service providers globally.

This unique perspective is now offered in a learning format to best benefit both the professional and the organisations that work with private clients.

- 1-day event for private wealth service providers
- Intensive thought leadership workshop
- Access deep independent academic research from
  - 500+ interviews with private clients
  - 500+ interviews with key wealth management decision makers
  - Across 24 global jurisdictions



### Masterclass impact

**Improve your acquisition** of private clients

**Make smarter decisions** by understanding private client decision-making

**Broaden your knowledge** of current and emergent themes and trends

**Develop confidence** with an in-depth understanding of behavioural biases

**Gain a holistic overview** of the private wealth universe

**Network** with key decision makers and peers

### Who attends?

The masterclass series is designed for professional private wealth service providers

### How you learn

- Explore real academic evidence from global private clients and leading private wealth service providers.
- Discuss themes and debate industry changes with Dr Stuart Gibson, consolidating your understanding of private client trends.
- Discuss, debate and explore the key issues with a diverse group of peers.

### Your learning experience

- Learn from Dr Stuart Gibson, an expert and specialist in private wealth, to sharpen your thinking and uncover the strategies behind significantly wealthy clients.
- Improve your private client universe by hearing from two guest speakers from the global wealth management sector.
- Benefit from the latest research by understanding emerging themes and changes.
- Raise your value-creation expertise in Acquisition, Client Trust & Service and Product Development.
- Build your knowledge base and leverage global networks by connecting with senior professionals

**Masterclasses will be held in 2021 across the UK, Africa (South Africa, Kenya and Nigeria) and Middle East (UAE, Saudi Arabia, Kuwait, Qatar, Oman and Bahrain).**

## Gibson Strategy

Our independent, panoptic insight across private wealth successfully influences corporate strategy within private wealth.

We offer a range of services which draw on source data gathered from deep academic research that we conduct revealing current trends, themes and thought-leadership crucial for developing future corporate strategy for your private clients.

**Dr Stuart Gibson**, PhD MSc DipM FCIM FCMI, is an expert in empirical research and business strategy within private wealth management. He has spent 38+ years working and collaborating with financial organisations, family-offices, UHNWs and HNWs across the globe.

## Services

Deep empirical research is our foundation from which we offer an array of services that are complimentary to wealth management businesses.

[Research](#) | [Education](#) | [Consulting](#)

For further details email **Dr Stuart Gibson**  
[stuart@gibsonstrategy.com](mailto:stuart@gibsonstrategy.com)

## Masterclass series

2021		2022	
4 Oct	Edinburgh	Jan	Dubai
6 Oct	Manchester	Jan	Riyadh
8 Oct	Leeds	Jan	Kuwait City
11 Oct	Bristol	Jan	Doha
14 Oct	London	Feb	Manama
TBC	Johannesburg		
TBC	Cape Town		
TBC	Lagos		
TBC	Nairobi		
3 Nov	Jersey		
5 Nov	Guernsey		
8 Nov	Isle of Man		
11 Nov	London		

Masterclass event - 1 delegate £895

## Online learning

Online learning programme - £495

## Research

### Private wealth reports

- Build brand awareness and value
- Issued to 20,000+ private wealth professionals
- Issued to 1,000+ private wealth clients

### Bespoke research

- Client-led, project focussed
- White-labelled research thought-pieces

## Education

### Masterclass workshop – focussed learning

- Current practice and approach
- Future themes and trends
- Key private wealth speakers
- Networking

### Online learning programme

- Modular programme
- Current practice and approach
- Future themes and trends

## Consulting

### Complex or single topic project

- Collaborative approach
- In-house research symposium included
- Retainer or bespoke arrangement