2026 Masterclass Course for Private Wealth Professionals

Client Engagement Strategy with Private Clients & Family Offices

Growth, Acquisition, Retention, Service, Experience & Development of Private Clients and Family Offices

This intensive thought leadership **1 Day Masterclass course**, delivered by **Dr Stuart Gibson** will show you how to improve the growth, acquisition, retention, service, experience, development and profitability of HNWs, UHNWs, entrepreneurs, family businesses (FBs), single-family offices (SFOs) and multi-family offices (MFOs) in today's changing and challenging times. This 1 Day Masterclass course is designed to help you build the skills necessary to implement an effective and profitable client engagement strategy for your business and a great opportunity to network with your fellow professionals.

Deliver winning growth strategies | Develop profitable client experiences | Build a more competitive business

Organisations Who Will Benefit

Private banks, corporate banks, investment banks, financial institutions, wealth management, family office consultants, trust & fiduciary services, asset & investment managers, life insurance & pensions, IFAs, private client law firms, private client accounting & tax advisers and all professional firms who engage with private clients & family offices.

Who should attend?

C-Level Executives: CEO, CFO, COO, CMO, Managing Directors, Business Unit Heads, Senior/Private Bankers, Relationship Managers/Directors, Wealth Managers/Advisers, Trust Directors, VP/Director Client Service, VP/Director Business Development/Distribution, VP/Director Marketing, VP/Director Client Engagement/Experience, VP/Director Client Strategy, Private Clients Lawyers, Private Client Accountants & Tax Advisers, and all professionals who engage with private clients & family offices.

In Just 1 Day You Will Learn

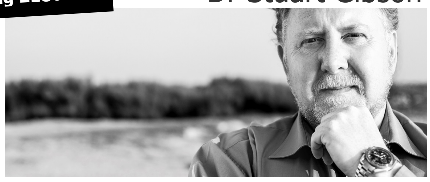
- ✓ How to **grow revenue and profitability of clients** in changing & challenging markets
- ✓ How to **build true client loyalty** - increase AUM from existing clients (share-of-wallet)
- ✓ How to gain the skills and understanding to **implement profitable business** strategies
- ✓ To **understand different behaviours** of HNWs, UHNWs, entrepreneurs, FBs and SFOs
- ✓ How to **create long-term trusted client relationships** and gain competitive advantage
- ✓ How to successfully implement a client strategy, **increasing organisational reputation**
- ✓ How to **improve client relationships**, creating long-term collaborative partnerships
- ✓ How to improve private client service quality and **recover from service failure**
- ✓ How to ensure client satisfaction and **increase cross-buying profitable opportunities**
- ✓ To **understand trusting behaviour,** trustworthiness, loss of trust and balance of power
- ✓ How to reduce switching and **maximise lifetime value of clients** through innovation
- ✓ The latest leadership thoughts in **legacy, NextGen wealth transfer, Philanthropy and AI**
- ✓ How to successfully **do business in the GCC region**
- ✓ Deep insight and the latest **key trends in Global Family Offices**

"Dr Stuart Gibson taught me on the BA (Hons) Financial Services degree for three years, he is an extremely inspirational educator, approachable and shared his expertise in financial services customer strategy. I was also very fortunate to later work with Dr Gibson and he has helped me get to where I am today in my professional career. I would strongly recommend him."

Eleanor Mulligan,
Business Development, Mourant

LIMITED PLACES AVAILABLE
Book before 18th August 2025
Pay £800 - saving £180

Dr Stuart Gibson



Masterclass delivered by **Dr Stuart Gibson**

Dr Stuart Gibson is globally recognised as a strategic advisor and thought leader in the private wealth and family office sector. With nearly four decades of experience, he provides exclusive guidance to a prestigious clientele, including ultra-high-net-worth (UHNW) families, entrepreneurs, and key players in the private wealth industry, such as single-family offices, multi-family offices, private banks, wealth managers, trustees, private equity firms, and venture capitalists. His academic credentials are equally impressive. Dr Gibson holds a PhD in Private Banking and Wealth Management, an MSc in Wealth Management and Digital Technology, and a Postgraduate Diploma in Marketing. These qualifications, coupled with his vast professional experience, position him as a leading voice in the future of private wealth and family offices.

"Dr Gibson is an extremely genuine guy, who I have known for over a decade, as both a colleague in the investment management firm Ashburton Investments and as a visiting lecturer at JIBS. A great wealth management marketer and goldmine of useable knowledge."

Gavin Fraser,
Jersey International Business School

Please email stuart@gibsonstrategy.com today to reserve your delegate place

Gibson Strategy Limited Email: stuart@gibsonstrategy.com Website: www.gibsonstrategy.com

2026 Masterclass Course for Private Wealth Professionals

Client Engagement Strategy with Private Clients & Family Offices

Growth, Acquisition, Retention, Service, Experience & Development of Private Clients and Family Offices

This exclusive **1 Day Masterclass** will include expert opinion, thought leadership and debate throughout the learning period. The sessions are highly interactive combining presentations, group debates and case studies to maximise the collaborative learning experience. This 1 Day Masterclass is specifically designed for C-Level Executives, Managing Directors/Directors, Business Unit Heads, Private Bankers, Wealth Managers, Relationship Managers and senior professionals in the Global Wealth Management and Private Banking sector.

Agenda

Understand private client behaviour and how to create value

Maximise your private client strategy and grow client revenue

08:00 - 08:40 Event registration and light breakfast buffet: network opportunity with other delegates.

Morning Session
Market Overview, Segmentation, Buyer Behaviour, Emotional Behaviour, Value, Relationships, Building Trust & Loyalty

08:45	Introduction to the Masterclass Event
09:20	Global Private Clients and Family Offices (FOs)
09:40	Private Client Segmentation and Selection Criteria
10:00	Buyer Behaviour, Emotional Behaviour, Trusting Behaviour, Behavioural Intent, Emotional Intelligence
10:20	Co-Creation of Value, Shared Values, Lifetime Value, Value Proposition
10:40	Case Study: Guest Speaker
11:00	Break (Tea/Coffee)
11:30	Client Relationship Management, Trusted Relationships, Partnerships, Long-term Relationships
11:50	Private Client Service Quality, Satisfaction and Delight
12:10	Private Client Trust, Loyalty and Retention
12:30	Case Study: Guest Speaker
13:00	Lunch (Buffet)

Build long term relationships and true client loyalty

Afternoon Session
Legacy: Succession Planning & NexGen Wealth, Sustainable Investing, Philanthropy, Artificial Intelligence, Female Leadership, Doing Business in the GCC Region & Family Office Global Trends

13:30	Legacy: Succession Planning & NexGen Wealth Transfer
13;50	ESG & Sustainable Investing
14:10	Philanthropy and Charitable Causes
14:30	Technology & Artificial Intelligence in Private Wealth
15:00	Break (Tea/Coffee)
15:20	Female Leadership in Private Wealth
15:40	Doing Business in the GCC Region
16:20	Panel Session: Guest Speakers "Family Office Global Trends & Thought Leadership"
17:00	Closing Remarks
17:15	Network & Light Refreshments

Attendance qualifies for CPD

Learn how to do successful business in the GCC region

BOX 1 – DELEGATE DETAILS – Please register ONE delegate per form

Delegate Name: Company: Address: City:

Country: Postcode/Zip code:

Email Address: Telephone: Mobile:

Signed: Print Name: Date:

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BOX 2 - MASTERCLASS DETAILS

Please indicate a location and date.

Location	Date	Yes	Price
London	Tuesday 20th January 2026		GBP £980
Manchester	Thursday 22nd January 2026		GBP £980
London	Tuesday 27th January 2026		GBP £980
Bristol	Thursday 29th January 2026		GBP £980
London	Tuesday 3rd February 2026		GBP £980

BOX 3 – PAYMENT DETAILS - Make a bank transfer to:

Bank:	Lloyds Bank
Account Name:	Gibson Strategy Limited
Sort Code:	30 - 94 - 61
Account Number:	60815168
IBAN:	GB07LOYD30946160815168

An invoice will be emailed to you.
Please see website www.gibsonstrategy.com for Terms and Conditions

Early Bird Offer £800 … if booked before 18th August 2025 - save £180 - full price £980