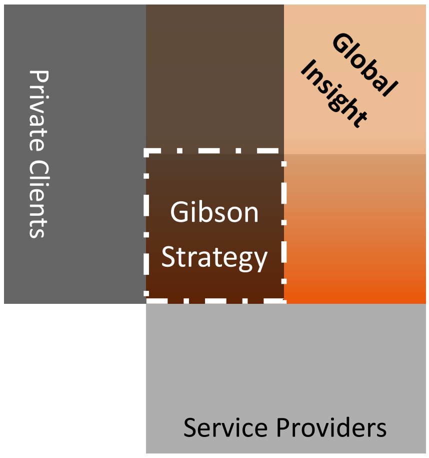
## Masterclass series

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 private wealth professionals and service providers in private banking, investment management, trust & corporate services, family offices, IFAs, legal, tax, insurance and real estate.

### 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 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).**

Influencing better wealth creation

## 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**

## 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 |
| 3 Nov | Jersey | | |
| 5 Nov | Guernsey | | |
| 8 Nov | Isle of Man | | |
| 11 Nov | London | | |
| 6 Dec | Johannesburg | | |
| 8 Dec | Cape Town | | |
| TBC | Nairobi | | |
| TBC | Lagos | | |

**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