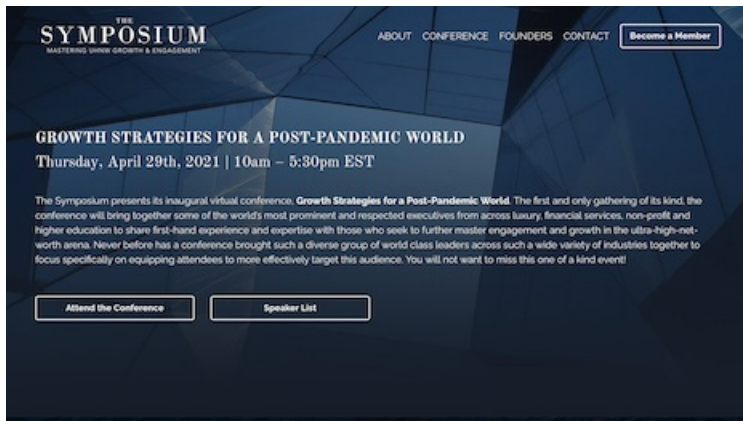


MARKETING

## The Symposium launches as event offering up UHNW post-pandemic strategy

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*The Symposium will discuss strategies for UHNW in the post-pandemic environment*

By MICKEY ALAM KHAN

The cofounders of WealthQuotient and a leading PR executive working with luxury brands have founded The Symposium, a virtual conference focused on the growth strategies for a post-pandemic market.

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The April 29 event will bring together executives from the luxury, financial services, nonprofit and higher education worlds to share first-hand experience and expertise with those who want to master engagement and growth in the ultra-high-net-worth area.

"The conference is designed for those who work specifically in the UHNW arena and are interested in strengthening their expertise with regard to engaging the ultra-affluent audience, as well as gaining tactical knowledge on how to expand their reach to new qualified prospects," said Brian Gonzales, Symposium cofounder.

Mr. Gonzales has partnered with WealthQuotient cofounder David Friedman and Shamin Abas, founder of her eponymous marketing communications and strategy for the wealthy, for **Symposium**. Messrs. Friedman and Gonzales were partners in their previous wealthy database Wealth-X brand which they sold.

Speakers include executives from Burgess, Dentons, VistaJet, Global Citizen, Christie's, MB&F, Neuberger Berman, Berkshire Hathaway HomeServices, Graff USA, McLaren, NetJets, Triton Submarines, Movember, Winch Design, Bugatti of the Americas, UCLA Health Sciences, Mot Hennessey USA, Ferretti Group, Northern Trust, EYOS, Drako Motors, charity: water, Molteni&C | Dada, DW NorthStar, Regional Hospice and Convene.

The agenda covers the new rules of engagement, interviews with those who work with the ultra-affluent, changing landing of engagement events, partnerships that work, aesthetic intelligence, donor acquisition in a virtual environment and data-driven prospecting.

In this Q&A, Mr. Friedman, Mr. Gonzales and Ms. Abas offer their take on the **Symposium**, the need it meets and what the events hopes to achieve for attendees. Please read on:



*David Friedman*

Why the launch of this event at this point in time?

Mr. Friedman: Last April and May, when the brands and organizations that our respective companies, [Shamin Abas](#) and [WealthQuotient](#), work closely with were contemplating the challenges that would lie ahead of them as the pandemic took hold of the traditional methods utilized for engagement and growth of the ultra-high-net-worth (UHNW) demographic and turned them upside down, Shamin, Brian and I aligned to launch a series of private, closed-door roundtable discussions for C-suite executives.

Prior to the pandemic, we had been talking for a year or so about the concept that shared learning could be gained if we were to bring together leaders from across the industries of luxury, financial services, nonprofit and higher education, whose focus is specific to this population.

Coupled with the fact that there hasn't existed a platform that allows free exchange of ideas, information and best practices across these industry sectors, the need could not have been more apparent based on the incredibly enlightening discussions that took place during the roundtable series and the unsolicited positive emails we received from its participants.

In fact, the response was so tremendous that we felt compelled to move forward with a plan to provide a platform that would allow for others in this space to be able to gain access. This was the impetus for The Symposium, and our first virtual conference which will focus on "Growth Strategies for a Post-Pandemic World."

Who is the target and what will this conference offer them that they cannot get elsewhere?

Mr. Gonzales: The conference is designed for those who work specifically in the UHNW arena and are interested in strengthening their expertise with regard to engaging the ultra-affluent audience, as well as gaining tactical knowledge on how to expand their reach to new qualified prospects.

The moderated discussions that will take place throughout the day will take place with some of the most respected leaders in the space, and participants will leave with powerful new learnings, not only strategically but tactically, that can be applied to their work for impactful results. Shamin Abas



*Shamin Abas*

The speaker line-up how did you decide who would speak and the companies they represent?

Ms. Abas: The conference will draw together a diverse group of 30 prominent leaders from across luxury, financial services, nonprofit and higher education, each of whom is at the pinnacle of their respective vertical and recognized for having mastered the art of building meaningful relationships with these often elusive and difficult to impress individuals.

Some of the leading companies represented by panelists include Burgess, Dentons, VistaJet, Global Citizen, Christie's, MB&F, Neuberger Berman, Berkshire Hathaway HomeServices, Graff USA, McLaren, NetJets, Triton Submarines, Movember, Winch Design, Bugatti of the Americas, UCLA Health Sciences, Mot Hennessey USA, Ferretti Group, Northern Trust, EYOS, Drako Motors, charity: water, Molteni&C | Dada, DW NorthStar, Regional Hospice and Convene.

In the morning, author of "The Thin Green Line: The Money Secrets of the Super Wealthy" and *New York Times* wealth columnist Paul Sullivan will host a compelling discussion on the mindset of the billionaire, with an aim to uncover insights that will equip attendees to more effectively target and connect with the 1 percent of the 1 percent, and after lunch, former chairman of LVMH and author of "Aesthetic Intelligence" Pauline Brown and I will sit down for a virtual fireside where she will share with us what aesthetic intelligence is, and why it is critical to consider for a brand or organization's competitive advantage.



*Brian Gonzales*

What's the focus of the event in terms of content and positioning?

Mr. Gonzales: The morning sessions will be centered on mastering approach for deepening engagement with existing clients and donors, with the afternoon focus shifting to strategies for growth and new client and donor acquisition.

Each session will be moderated, and panels will be diverse, ensuring compelling and enlightening discussion.

The agenda will include topics such as best practices and new engagement approaches for the world we are living in today, and as we emerge from the pandemic; how organizations are adapting their approach to events to ensure goals are met with success; approach, methodology and tactics organizations have successfully utilized to harness affinity partnerships in this arena that have delivered expanded reach to new, qualified audiences; the impact of the pandemic-driven virtual shift on new client/donor acquisition, relationship development and building trust in this new virtual landscape; how to navigate the role data plays when referrals continue to be the primary path of new growth, and how to harness its power to drive more prospect-centric strategies; and proven tactics and strategies for accessing more prospects in less time and why referrals are ultimately your team's best friend.

What's the goal for this event and what do you intend it to achieve for invitees?

Mr. Friedman: We are thrilled to soon launch our first of its kind membership-based platform, The Symposium, with a goal of building a community for executives and professionals across luxury, financial services, nonprofit and higher education that cultivates conversation and content for mastering UHNW growth and engagement.

The by-invitation platform will offer ongoing content, forums and networking opportunities and more details will be shared during the conference on April 29.

With the challenges facing those responsible for growth at brands and organizations as we emerge from the pandemic, we felt compelled to provide an environment for professionals in this space that would allow them to

gain a strong grasp of the current state of mind of those of exceptional wealth, and a clear understanding of the strategies some of the leading companies are implementing to ensure they stay connected to their clients and prospects.

The unequivocal objective for our inaugural conference is to give to all who participate the opportunity to leave the day with tremendous new insight and knowledge, which they can go on to use within their own strategies.

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