Navigating Careers in Investment

Philip Guest (Radley parent)

Founder of Oxford Strategy, and Futurist

Philip will moderate our panel session.

Having qualified as a chartered accountant with Arthur Andersen, Philip switched into television channel management with Walt Disney and Sky Television, then internet content distribution with Vodafone and Virgin Media, before joining UBS Global Asset Management where he managed various pan-European equity funds.

Along the way he graduated from Cambridge with a degree in economics, then Oxford with a masters in strategy and innovation. He was voted Extel European Fund Manager of the Year in 2013.

As a futurist, Philip now empowers companies to succeed by anticipating changes in their business environment.

Talk to Philip about:

- What is foresight and why does it matter?
- How to manage career change.
- The usefulness of qualifications.

OXFORD STRATEGY

Oxford Strategy is a business consulting company. It has a long track-record of working with businesses to seize the opportunity in disruption by leveraging foresight to identify the relevant disruption, making the guiding choices needed to seize the opportunity identified, sustaining competitive advantages and building new ones. To find out more visit https://www.oxstra.com/

Navigating Careers in Investment

Talk to Alan about:

• Building a career in Fintech-focused venture capital.
• Careers in Private Equity and Private Asset Investment
• Founding and Scaling a Business.

LAUNCHBAY CAPITAL

Launchbay Capital VC, with offices in London and Tel Aviv, is a venture capital firm focused on fintech, SaaS, blockchain, AI, and machine learning. Alan's firm has invested in over 60 companies, including high-profile exits like Lemonade and Monday.com, as well as other innovative projects. He also founded Launchbay, a private assets investment platform, giving him a comprehensive view of the modern investment ecosystem.

Alan Vaksman (Radley parent)

Founder & Managing Partner, Launchbay Capital VC

Alan Vaksman offers invaluable insights into the investment industry, particularly in private equity and venture capital, for those aspiring to build a successful career in this field.

As the Founder and Managing Partner of Launchbay Capital VC, Alan leverages over 23 years of experience in corporate investment banking, venture capital, and management consulting to provide practical guidance for navigating the early stages of an investment career.

In this session, Alan will share insights on career development in the venture capital industry, offering practical advice for those seeking to enter the investment world. Whether you're considering a path in venture capital or financial technology, Alan's extensive experience can provide a roadmap for navigating early career decisions and understanding what it takes to succeed in investment roles today.

Alan's career spans global markets, including South Africa, Europe, and Israel, where he has held senior positions such as Chief Risk Officer, and Head of Technology Investments at a $100bn+ bank. He has also served as a Director at a London Stock Exchange-listed tech and social media company, and as a Partner at PwC, where he led capital markets and risk management teams. Additionally, Alan has successfully co-founded and exited two fintech businesses, providing invaluable insights into entrepreneurship within the financial sector.

Alan holds a bachelor's degree in Economics and Psychology and a postgraduate degree in Corporate Law from the University of the Witwatersrand, South Africa. He also holds a TRIUM Global Executive MBA from NYU Stern (USA), the London School of Economics (UK), and HEC Paris (France).

Navigating Careers in Investment

Tom Holbrook (2006, D)

Portfolio Manager, Cazenove Charities

Tom will talk about sustainable investment and how investors can make a difference by being more conscious with their capital.

Tom is a Portfolio Manager at Cazenove, specialising in advising charities, non-profits, and foundations on their investments to help them achieve their long-term financial returns and amplify the impact they can have on their beneficiaries.

Before joining Cazenove, Tom spent a decade at Investec, where alongside his client responsibilities, he sat on the firm's Listed Equities Committee and Sustainable Finance Steering Committee. He has a Post-graduate Certificate in Sustainable Business from the Institute for Sustainability Leadership (University of Cambridge) and holds a CFA Certificate in both Climate Investing and ESG Investment.

Talk to Tom about:

- Why investors choose sustainable investment
- Types of socially responsible investment
- The options available to charities

Cazenove Capital

Cazenove Capital are the largest investment manager to the top 5,000 charities in the UK, responsible for £12 billion of assets owned by the not-for-profit sector.

Their Sustainable Multi-Asset Fund has been the fastest growing UK charity fund since 2019. They recognise that clients have a wide variety of requirements in relation to Socially Responsible Investment, and have established clear frameworks to deliver thoughtful solutions to some of the difficult questions in this area. Cazenove Capital is part of the wider Schroders Group.

Navigating Careers in Investment

Max Bullen-Smith (2004, E)

Investment Director: Head of M&A, Ardonagh Specialty

Max specialises in deal origination and execution, target and insurer advisory services and deal negotiation. He has over 10+ years' experience working in the M&A space.

He joined The Ardonagh Group in 2020 as head of Mergers and Acquisitions for Ardonagh's specialty division and an Investment Director for the Group. He is responsible for identifying potential acquisition and investment targets, conducting deal due diligence and also for deal execution. Max operates across all areas of Investment & M&A within the insurance industry from brokers across all product lines, reinsurers, MGAs and affiliate financial services companies.

Prior to joining Ardonagh, Max worked at Cavendish within their public company M&A team where he advised on complex cross-border and domestic takeovers of publicly listed businesses on the AIM and Main markets from international buyers, before pursuing private company M&A within the insurance space.

Max started his career as a strategy consultant with Accenture after graduating from the University of St Andrews.

Talk to Max about:

- Getting into Investment Banking.
- Early finance career guidance.
- Private company Mergers & Acquisitions.
- Fintech within Insurance and the Insurance industry.

Ardonagh Specialty

Ardonagh Specialty is a holding company and growth platform for leading independent brokers across the wholesale, specialty and reinsurance sectors.

With a strong presence and deep relationships worldwide and a steadfast commitment to investing in the best people, markets and technology, together our brands offer open market broking, programmes, reinsurance and international solutions designed to empower clients to achieve their strategic ambition.

Navigating Careers in Investment

Alex Bowden (1986, F)

Managing Partner at Evelyn Partners

Alex will talk about a career over three decades in the private wealth industry.

Alex Bowden has worked as an investment manager for private clients for over 28 years, most recently and currently at Evelyn Partners.

The focus of his work is looking after the financial circumstances of private families, often multi-generational, both on- and offshore, and liaising with their other professional advisors to ensure their investment objectives are achieved over the long term. We manage a broad range of accounts for individuals, trusts, pensions and corporate structures.

After graduating from the University of Bristol with a degree in German, Alex joined the City in 1996 to work for Fleming Private Asset Management on the International Desk for five years before moving to NCL in 2001, which soon thereafter merged with Smith & Williamson.

At Smith & Williamson Investment Management (now Evelyn Partners following a merger with Tilney in 2020), Alex became a director in 2009, a partner in 2013 and a managing partner in 2020.

Alex is a Chartered Fellow of the Chartered Institute for Securities & Investment

Talk to Alex about:

- Approach to a career in investment for private clients
- What are the major threats and opportunities to the industry
- How to build a portfolio for a private client

evelyn PARTNERS

Wealth, accountancy and business advisory services, providing advice since 1836. We invest capital for our clients globally across a broad range of asset classes, strategies and risk profiles.