

Technology in Wealth Management Market 2017 – By Analyzing the Performance of Various Competitors

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SUMMARY

WiseGuyReports published new report, titled "Technology in Wealth Management"□

"Technology in Wealth Management: Drivers for Adoption and Future Trends", report provides a comprehensive analysis of how technological developments are affecting the wealth management industry, including both traditional

providers and new digital entrants to the market. Among others, the report leverages findings from our Global Wealth Managers Survey and Mass Affluent Investor Survey. Investing in technology has leapt to the top of most wealth managers' agendas. The emergence of robo-advisors has triggered interest in changing investor demographics and new approaches to client segmentation. On the other hand, shrinking margins and pressure on cost-saving have fueled organizations' internal needs to seek efficiencies, and these can be achieved with the help of technology. Although ultimately the human element will remain prominent in the world of financial advice, the industry will continue its technological advancement.

Specifically the report –

- Provides an overview of trends in the wealth management and wider financial services industry related to technology.
- Analyzes key drivers behind the adoption of technology and digital solutions in wealth management, looking at both external and internal factors.
- Examines how providers need to adapt to changing client behaviors and preferences in the HNW and mass affluent segments.
- Investigates the future model of robo-advice service and how hybrid digital-human solutions can help to grow business.
- Assesses how different software and tools, including big data and blockchain, can improve the operating efficiency of incumbent wealth management organizations.
- Identifies where the biggest investment gap in the wealth management industry lies, providing an opportunity for IT vendors.

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Technology in Wealth Management

Scope

- Lower returns increase investors' price sensitivity, luring them into the arms of low-cost digital providers.
- Although the average robo-advice client falls into the mass affluent category, HNW investors will also recognize the benefits of digital platforms.
- With millennials building up their wealth, and intergenerational change on the horizon, financial advisors need to prepare themselves for a new generation of clients, while not abandoning their existing clientele.
- Combining the best of human and digital capabilities will lead to successful hybrid advice model development.
- Investment in technology is focused on the front-end, the back-office being lower priority.
- Adoption of technologies such as big data and blockchain remains low in wealth management, and the industry will wait for other branches of financial services to test the waters.
- Despite some high-profile partnerships between incumbents and fintechs, established IT vendors remain better positioned to work with large wealth management organizations.

Key points to buy

- Understand what has driven change in the wealth management industry's approach technology.
- Discover key drivers and barriers for technology adoption in the industry.
- Learn about how changing client expectations and how you can prepare for the new digitally-savvy generation of HNW individuals.
- Examine the most successful robo-advice providers and reasons for their popularity.
- Recognize which key areas of operations within wealth management organizations can most benefit from technology, and how.
- Find out about the industry's approach to the most innovative technologies such as artificial intelligence, big data, and blockchain.
- Identify opportunities for wealth managers to work with established IT vendors, as well as fintech start-ups.

Table of Contents

1. Executive summary
2. WEALTH MANAGERS AND TECHNOLOGY: GENERAL TRENDS
3. TECHNOLOGY IN WEALTH MANAGEMENT: DRIVERS FOR ADOPTION
4. THE NEXT STEP FOR ROBO-ADVICE: HYBRID OFFERINGS
5. DIGITAL EFFICIENCY TOOLS
6. WEALTH MANAGERS' COLLABORATION WITH IT VENDORS
7. APPENDIX

..CONTINUED

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