

# Wealth Management Market to Reach \$3.43 Trillion at 10.7% CAGR by 2030

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NEW CASTLE, DE, UNITED STATES, September 23, 2025 /EINPresswire.com/ -- Allied Market Research published a report, titled, "[Wealth Management Market](#) By Business Model (Human Advisory, Robo Advisory, and Hybrid Advisory), Provider (FinTech Advisors, Banks, Traditional Wealth Managers, and Others), and End-user Type (Retail and High Net Worth Individuals (HNIs): Global Opportunity Analysis and Industry Forecast, 2021–2030." According to the report, the global wealth management industry generated \$1.25 trillion in 2020, and is anticipated to generate \$3.43 trillion by 2030, witnessing a CAGR of 10.7% from 2021 to 2030.

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## Prime Drivers of Growth

The global wealth management market is driven by rapid demand for alternative investments including private equity, commodities, hedge funds, real estate investment trusts (REITs), and intellectual property. However, factors such as strict rules of the government for wealth management companies, lack of pricing transparency, and high fees restrict the market growth. On the other hand, technological advancements and untapped potential of emerging economies are providing lucrative opportunities for the market growth.

## The Human Advisory Business Model to Maintain the Leading Position Throughout the Forecast Period

Based on business model, the human advisory segment dominated the market with the highest market share in 2020, garnering more than three-fourths of the global wealth management market, and is expected to lead throughout the forecast period. These advisors serve a changing client base in a variety of demographics and offer fluidity in the approach while managing wealth, which in turn, drives the growth of the segment. However, the robo advisory segment is expected to portray the fastest CAGR of 26.4% from 2021 to 2030, attributed to easy account setup, comprehensive education, portfolio management, robust goal planning, account services, security features, attentive customer service, and low fees.

## The Traditional Wealth Managers Segment to Maintain the Leading Position during the Forecast Period

Based on provider, the traditional wealth manager segment generated the largest share in 2020, contributing to nearly two-thirds of the global wealth management market, and is projected to maintain its dominance throughout the forecast period. This is because a traditional wealth manager offers convenience and reduces stress towards managing finances of the clients. On the other hand, the fintech advisors segment is anticipated to manifest the highest CAGR of 16.8% from 2021 to 2030. The growth of the segment is due to the efforts of fintech advisors to create a solid business plan and market strategy, advice on regulatory compliance that meets state and federal standards, and help in building credible relationships with banks, customers, and investors.

## North America to Maintain its Dominance by 2030

Based on region, North America held the largest market share in terms of revenue in 2020, accounting for more than half of the global wealth management market, and is anticipated to maintain its lead by 2030. This is attributed to the presence of a massive number of high net-worth individuals and increase in number of competitions among banks such as UBS, Morgan Stanley, and Bank of America Corporation to offer the maximum benefits to their clients. However, the Asia-Pacific region is projected to manifest the fastest CAGR of 12.7% during the forecast period, due to the several high net worth & ultra-high net worth individuals continuing to demand wealth management product lines in the region.

## Leading Market Players

Bank of America Corporation,  
Citigroup Inc.,  
CREDIT SUISSE GROUP AG,  
BNP Paribas,  
Goldman Sachs,  
JPMorgan Chase & Co.,  
UBS  
Charles Schwab & Co., Inc.,  
Julius Baer Group,  
Morgan Stanley,

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## Key Benefits for Stakeholders□

The study provides in-depth analysis of the global wealth management market share along with

current trends and future estimations to illustrate the imminent investment pockets.

Information about key drivers, restrains, and opportunities and their impact analysis on the global wealth management market size are provided in the report.

Porter's five forces analysis illustrates the potency of buyers and suppliers operating in the wealth management market.

An extensive analysis of the key segments of the industry helps to understand the wealth management market trends.

The quantitative analysis of the global wealth management market forecast from 2021 to 2030 is provided to determine the market potential.□

Wealth Management Market Key Segments:□

By Business Model

Human Advisory

Robo Advisory

Direct Plan-Based/Goal-Based

Comprehensive Wealth Advisory

Hybrid Advisory

By Provider

FinTech Advisors

Banks

Traditional Wealth Managers

Others □

By End-user Type

Retail

High Net Worth Individuals (HNIs)

By Region

North America

U.S.

Canada

Europe

UK

Germany

France

Switzerland

Italy

Spain

Rest of Europe□

Asia-Pacific□  
China  
India  
Japan  
Australia  
Singapore  
Rest of Asia-Pacific □□  
LAMEA  
Latin America□  
Middle East  
Africa

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We are in professional corporate relations with various companies, and this helps us in digging out market data that helps us generate accurate research data tables and confirms utmost accuracy in our market forecasting. Allied Market Research CEO Pawan Kumar is instrumental in

inspiring and encouraging everyone associated with the company to maintain high quality of data and help clients in every way possible to achieve success. Each data presented in the reports published by us is extracted through primary interviews with top officials from leading companies of domain concerned. Our secondary data procurement methodology includes deep online and offline research and discussion with knowledgeable professionals and analysts in the industry.

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