

Trust in Financial Services Is Shifting From Institutions to Individuals, New Report Finds

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PORTLAND, OR, UNITED STATES, June 22, 2026 /EINPresswire.com/ -- Trust in Financial Services Is Shifting From Institutions to Individuals, New Report Finds

[The Trust Transition](#), the 2026 SWAY + SIGNAL report from [Sheri Fitts](#), names seven signals remaking the industry and launches a five-part live conversation series to explore them.

Financial services brand strategist and speaker Sheri Fitts has released *The Trust Transition: Seven Signals Reshaping Financial Services*, the 2026 edition of her annual SWAY + SIGNAL report. The report makes a direct case to advisors, distributors, home office leaders, and the wider financial services ecosystem: trust is no longer anchored in institutions. It now flows through individuals, and the firms that recognize the shift are already pulling ahead.

Global trust in financial services sits near the bottom of the trust range, even as 93 percent of clients say they would follow their human advisor to a new firm and 87 percent of buyers research a professional long before that professional knows they exist. The report's conclusion: humanity is now a measurable growth strategy, not a soft skill.

"Your humanity is not a soft skill. It is a quantifiable growth strategy," said Fitts. "For decades the institutional logo did the vouching. That agreement is breaking down, and what people trust now is a person. This report is about what to do with that."

The report tracks seven signals, each building on the last: the trust transition from institutions to individuals, a visibility imperative that pushes professionals beyond expertise into earned attention, the rise of AI as a copilot rather than a replacement, experience designed beyond commodity service, a culture dividend that decides whether consolidation creates or destroys





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Sheri Fitts, Founder and Creator

value, the great convergence of wealth, health, and longevity, and the growing power of micro-communities. It closes with a leadership mandate, a call for the industry to move from credential-based authority to character-based influence.

To carry the ideas into the open, Fitts is hosting a five-part LinkedIn Live series, The Trust Transition: A Live Conversation Series, beginning the week of June 22, 2026. Each episode pairs Fitts with an industry voice to examine what transformation looks like in practice. Confirmed guests include Joe Pine, author of The Experience

Economy, and his new book, The Transformation Economy. Other guests include Raenne Lacatena, Freddy Mendoza, Niels Gott, Jefferson Cheshier, Fred Reish, and Nevin Adams. The series will continue with weekly conversations via LinkedIn Live.

The Trust Transition is available at no cost at sherifitts.com/thetrusttransition. The full series schedule and registration details are available on the same page and through Fitts' LinkedIn.

ABOUT SHERI FITTS & CO.

Sheri Fitts is a financial services brand strategist, speaker, and founder of Sheri Fitts & Co. She is the creator of the SWAY brand, which spans the annual SWAY + SIGNAL report, the [SWAY | LIVE](#) conference, and the SWAY Collective, and she works at the intersection of humanity and growth through her digitalEQ framework. Learn more at sherifitts.com.

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