

Future of Asset and Wealth Management Report, 2024 and Beyond

Future, Faster. **Together.**

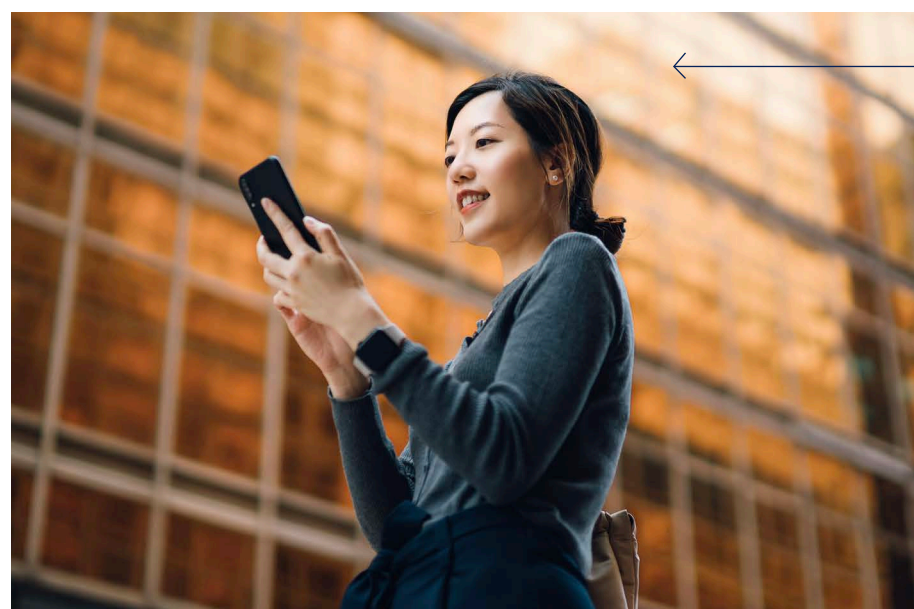
TREND - 1

The Great Wealth Transfer

The great wealth transfer presents a prime opportunity for firms to expand their market reach over the next two decades.

> Insights:

- Seize wealth transfer as a chance for market expansion
- Adapt to shifting family dynamics for improved wealth management and distribution



TREND - 2

Digital Experience in Wealth Management

Wealth firms enhance client experiences through AI-driven personalization & seamless online interactions.

> Insights:

- Embrace AI-driven personalization and online interactions for enhanced client loyalty
- Implement strategic tools to complement human interaction, offering seamless self-service and personalized options

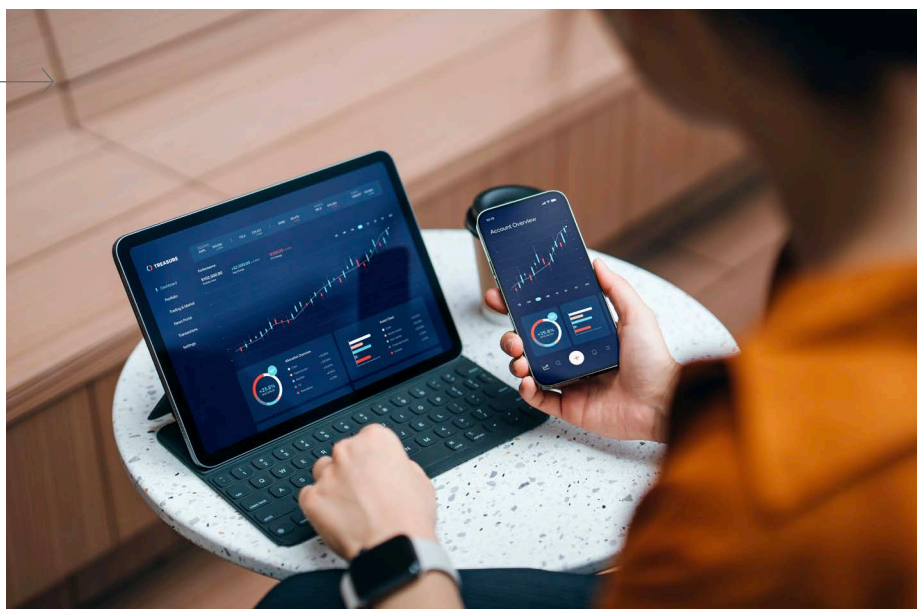
TREND - 3

Alternative Investment and Private Market Access

Wealth managers adopt private markets to diversify portfolios for higher returns.

> Insights:

- Capitalize on private markets for growth amid volatile economies
- Utilize diversification to drive investor decision-making
- Embrace the attractiveness of private debt, infrastructure, and real estate options



TREND - 4

Alternative Data for Investment Strategies and Business Transformation

Alternative data transforms investment strategies and empowers firms to gain a competitive edge.

> Insights:

- Leverage alternative data for real-time insights
- Implement regulatory frameworks to utilize alternative data responsibly

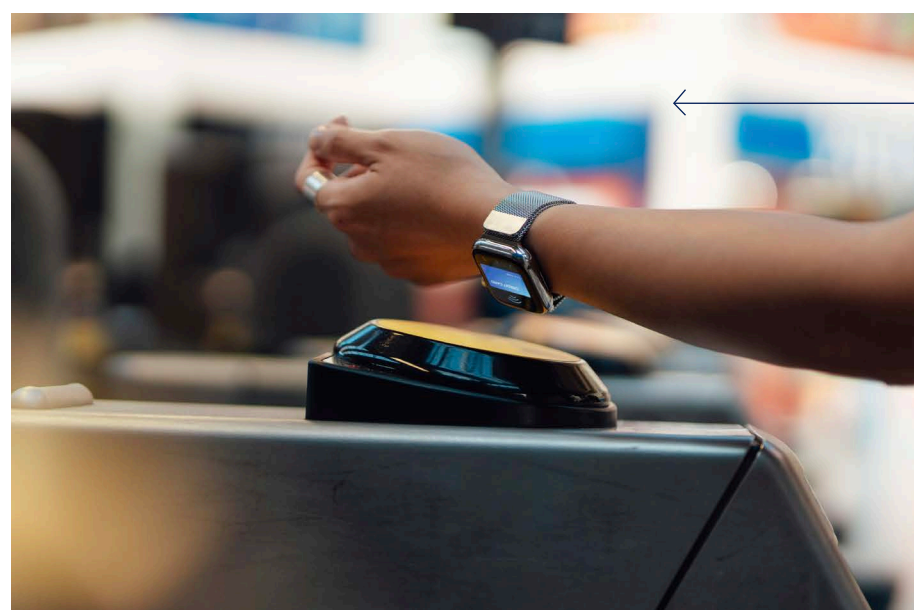
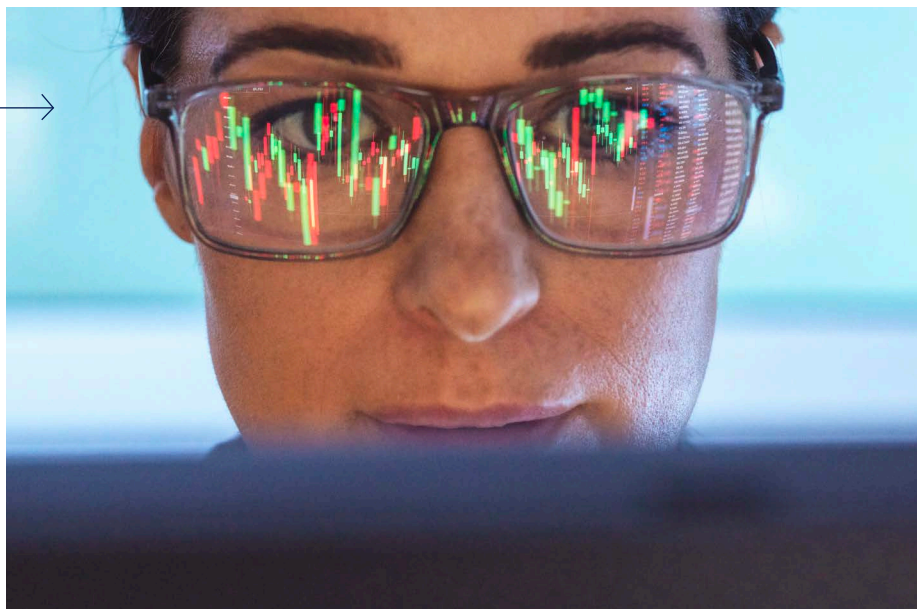
TREND - 5

Post-Trade in the Digital Era

Digitalization is crucial for streamlined operations and cost reduction. It enhances efficiency and competitiveness.

> Insights:

- Simplify complex tech setups for sell-side firms
- Implement cloud solutions to modernize systems



TREND - 6

Intelligent Automation (IA) in Wealth Management

IA transforms wealth management, enhancing efficiency and client experience.

> Insights:

- Boosts productivity, assets, and revenue
- Enhances compliance, risk management, and decision-making
- Leading firms use IA for personalized services and data-driven insights

