

POST-COVID IMPERATIVES

FOR WEALTH MANAGEMENT ORGANIZATIONS

WITH CHANGING LANDSCAPE, HERE ARE THE
FIVE IMPERATIVES FIRMS NEED TO ADAPT TODAY

PERSONALIZE PRODUCT OFFERINGS

1

60% of Investment firms want to enable their sales team with customized products and services to meet the growing investor expectations.

REDUCE COMPLIANCE COSTS

2

More than **32%** of digital leaders are focussing on automating key elements of compliance. **51%** of them cited enhancing systems and processes to meet new or revised regulatory requirements.

RE-STRATEGIZE DISTRIBUTION MODEL

3

54% of the Asset managers are slowing moving away from the intermediaries and want to enable fintech powered digital marketplace.

FOCUS ON IMPACT INVESTING

4

Sustainable investments to grow by **18%** each year to **\$9 trillion by 2024**. Firms have the opportunity to develop a significant competitive edge and secure long-term market presence in this growing space.

EMBRACE DIGITAL TRANSFORMATION

5

96% Investment firm CEOs view digital transformation & cloud adaption as central to their businesses and report that their companies are actively undergoing digital transformation.

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