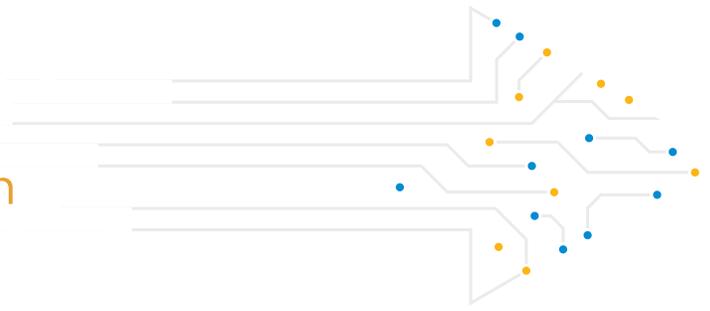


Accelerating the WealthTech Transformation

An Investnet Report Illuminating Opportunities Ahead



At Investnet, we believe the age of the intelligent, connected financial life is what is next for our industry. And we are ready to empower it by expanding the ecosystem of solutions we offer consumers.

Many advisors and financial planners tend to support just some aspects of their clients lives. But we believe that with customer education, smart technology, and a reframing of how advisors and their clients work together, the advisor of the future will be able to make this vision a reality for an ever-growing proportion of the population. Here are five WealthTech trends expected to transform our industry in the years ahead.

Five WealthTech Trends in 2021 & Beyond



Client Lifecycle Management: Automated, Earlier, and Evolving

Advisors and firms have always been designed to deliver services tailored to the client lifecycle, from prospecting, to onboarding, to progression through life events and the accumulation of wealth. This was traditionally a manual process, but now fintech tools and data add substantial value in lifecycle management.



Clients Attitudes and Actions: More Digital, More Values-Based, More Visibility

Changes to wealth management start with the end customer: the clients who depend on and seek value from advisors and firms. The events of 2020 had profound impacts on clients interests and expectations.



Products and Services: Collaborative, Personalized, and Holistic

As client motivations and expectations have changed, the products and services offered to them need to evolve in lockstep.



Advisor Essentials: Perception, Automation, and Proactive Ideas

In addition to the tools that help advisors connect with their clients digitally, technology and data are helping increase the power and effectiveness of advisors.



Back Offices and Business: The Balancing Act

For wealth management firms, the long-term trend has seen shrinking margins and a search for efficiencies of scale and new revenue streams. While there isn't a single best approach for the future, we believe outsourcing back-office tasks can enable more rapid evolution for firms of all sizes.

Ready to Accelerate Your Practice?

Download our report, Accelerating the WealthTech Transformation.