

THE CHANGING LANDSCAPE OF WEALTH MANAGEMENT

Technology antiquity and **outbound migration of talent** are forcing wealth management firms to change their ways of doing business. With an epic wealth shift on the horizon, adapting to new business solutions is essential for growth – and survival.

THE STATE OF WEALTH MANAGEMENT IS IN FLUX.

95%

of financial advisors are expected to offer advice on **assets held away**.¹

19%

of financial advisors believe **digital advice** can complement their business.²

TODAY'S FINANCIAL ADVISORS



Financial Advisers **past the age of 60**³



Control **\$2.3 trillion** of client assets



43% are close to retiring

THE FUTURE



Over the next **30 years...**
\$30 trillion⁴ will be passed down from



BABY BOOMERS



GENERATION X



MILLENNIALS

WHY DOES THIS MATTER?

This is going to require the next generation of advisors to respond to a **new set of customer expectations**.

Already between the **lack of adoption of advanced technology tools** and the **inability to customize performance reports** for HNWI with assets held away, financial advisors are facing significant challenges.



Nearly **two-thirds** of the world's HNWI expect to manage most or all of their wealth digitally within **five years**.⁵

THE QUESTION

Will financial advisors be able to offer the **custom solutions and technology assets** necessary to retain – and grow – their business?

The Rage LiveWealth™ Intelligent Agent platform is a full featured, end-to-end wealth management service, with features ranging from data aggregation to powerful big data analytics. It enables the world's leading wealth management firms and financial advisors to drive the client experience to new levels of engagement, economically and rapidly, without disrupting existing internal IT infrastructure. Endless configuration possibilities allow FAs to fine-tune the solution to their unique needs, including:

- Quad Reporting
- Data sorting on screens
- Creation of dummy accounts
- Creation of reusable templates
- Private labeling for branding reports
- Drag-and-drop capabilities

CITATIONS:

1. "Capturing New Revenue Through Data Aggregation Survey Results", Finserv Executive Briefing Paper, [Click Here to View Link](#)
2. "Robo-Advisors: Threat or Opportunity?", Investopedia, December 2015, [Click Here to View Link](#)
3. "Close to Retiring? Uh-Oh, So is Your Financial Adviser", TIME Magazine, July 2013, [Click Here to View Link](#)
4. "The Great Wealth Transfer is Coming, Putting Advisers at Risk," Investment News, July 2015, [Click Here to View Link](#)
5. "Best of 2014: Wealth Management Trends and Challenges", Enterprising Investor, December 2014, [Click Here to View Link](#)