



WEALTH MANAGEMENT IN 2020

What's a digital laggard and are they finally waking up?



SAM TURNER

CONSULTANT, ALTUS



COVID-19

For Wealth Management – the big

ACCELERATOR?



Wealth Management

WAKING UP THE LAGGARDS





ADOPTING DIGITAL CAN BROADEN REACH

Enabling access to and engagement with

FINANCIAL SERVICES



DIGITAL “TRANSFORMATION”

WHAT HAVE WE SEEN IN

REALITY?



Responding to
COVID-19
Crisis Phase



Increased

Online MEETINGS

Teams, Zoom etc.



Enhanced

Digital ENGAGEMENT

Electronic Signatures

Have we seen

Anything more than this?

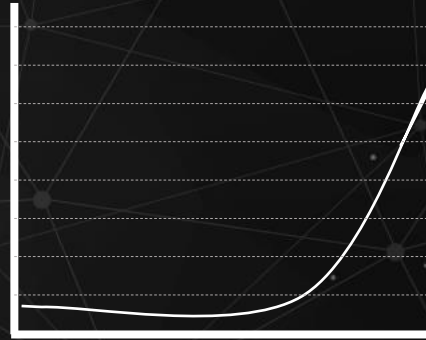
NOT REALLY



But that's OK because

DIGITAL ADOPTION

Curves look exponential





“ Seemingly Minor
ATTITUDINAL CHANGE
Has the potential to stimulate
**PROFOUND
TRANSFORMATION** ”

Turner, et al. (2020)





WHAT'S THAT

COMING OVER THE HILL? IS IT A

MONSTER?



WMM OF THE FUTURE



Hybrid, bionic, digital advice processes



Use of AI to better understand customers



Best of breed, ecosystems and componentised architecture



Subscription models and services on demand





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Sam Turner

Consultant | Altus Consulting

sam.turner@altus.co.uk



[Linkedin.com/in/sam-turner](https://www.linkedin.com/in/sam-turner)



[@raconteurner](https://twitter.com/raconteurner)