

Creating the future client experience

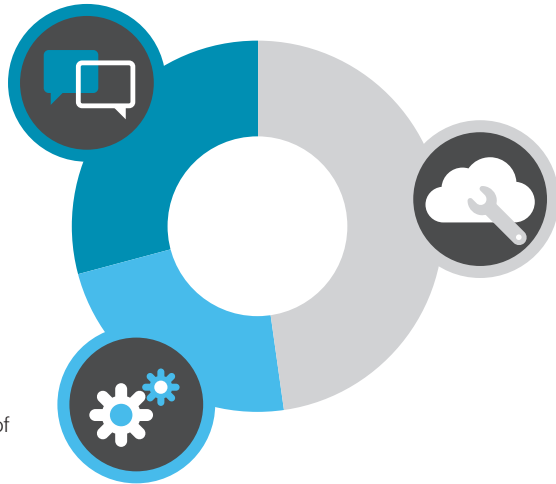
HNW Investors as a Wealth Management CEO for the day. What are the CX priorities?

We asked HNWI, all clients of the wealth industry, “if you were Chief Executive of a wealth management firm for a day, in which areas would you be trying to innovate the customer experience?” The answer - Improve the digital experience/communications.

Communication

29%

Enabling connectivity with other clients of the firm; Improving communication methods between clients and the firm



Digital

48%

Customising client service, using online tools to provide advice, investment recommendations and financial planning and using digital tools like electronic signatures

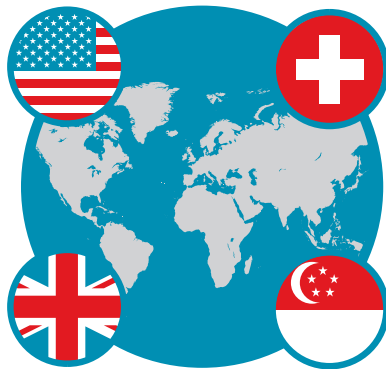
Process

23%

Improving the efficiency of complaints resolution and feedback implementation

“Prioritise an app that daily summarises my finances and their management”

US investor



“A ticker system to highlight investment progress in real time”

UK investor

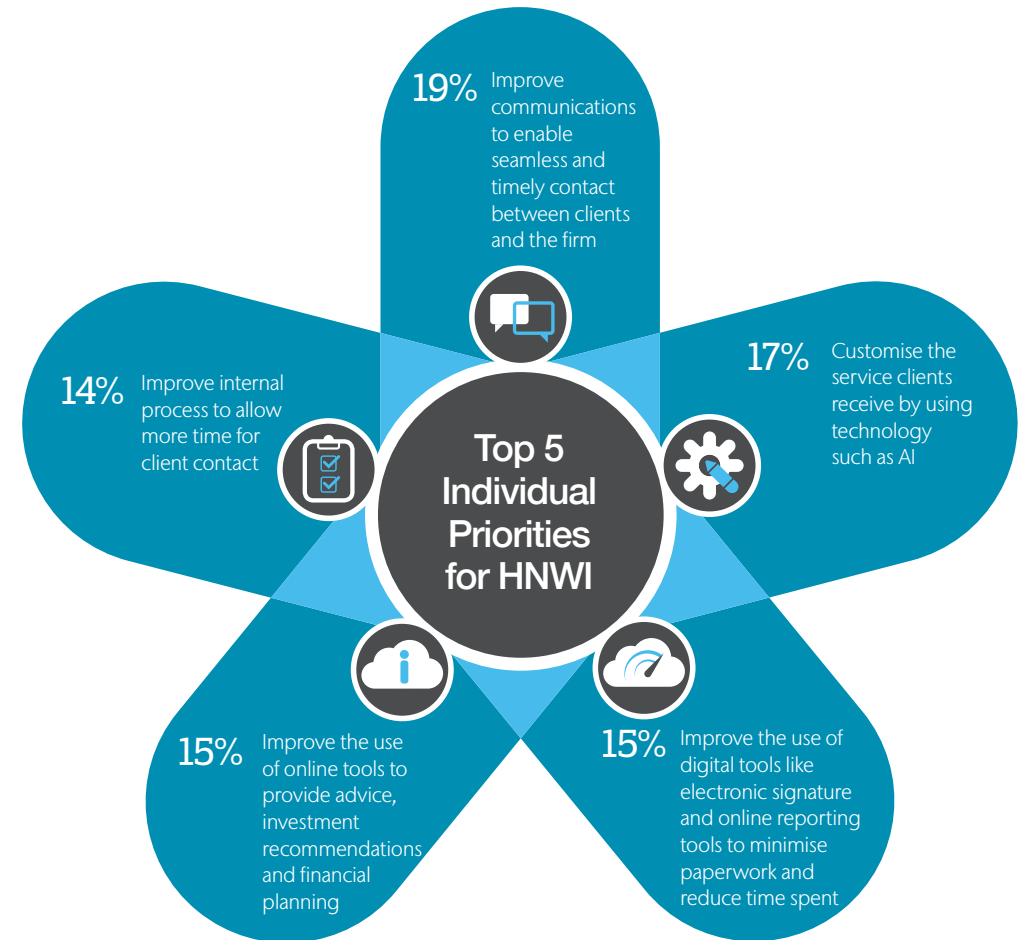
“Portable technology for information on asset allocation analysis”

Swiss investor

“Adopting AI for generating models to forecast future investment growth”

Singaporean investor

Source: Scorpio Partnership/Factset)



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