

Independent Wealth Managers – Sustaining and Growing the Business in 2021 and Beyond

3.00pm

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- How are Independent wealth managers performing in Asia?
- Where are you focusing your efforts in 2021?
- Has your USP changed in the last year?
- How are they competing against other types of wealth management firms – like private banks?
- How has Covid-19 affected your business?
- How are you connecting with new clients? Especially the Next Generation?
- Are you converting more of your existing clients to high added-value discretionary and advisory revenues and thereby enhancing revenue predictability?
- What digital enhancements have you made in the last 12-months?
- How are you making your operations more efficient, for example through further digital adoption, through greater use of outsourced digital execution and custody platforms?

Urs Brutsch
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4.00pm

Webinar Ends