

EXECUTIVE SUMMARY

Wealth Management

AFTER
THE
CRUNCH ● ● ● ● ●

360° Research

AFTER THE CRUNCH EXECUTIVE SUMMARY

More than a third of wealthy individuals are set to switch their adviser, according to the Wealth Management After The Crunch research report from Dow Jones.

The research surveyed more than 150 wealth management executives, nearly 100 high net worth individuals and 65 industry intermediaries globally, and was co-authored by Dow Jones Wealth Bulletin and Bruce Weatherill, an independent consultant and former head of the wealth management practice at PricewaterhouseCoopers.

The research found that 42% of clients were likely to review or change their wealth manager in the wake of the financial crisis while 30% were unlikely to do so. Only one in four clients said they would recommend their wealth manager to a friend, family member or colleague.

Among the topics covered in the research report are:

- The top reasons why clients select, keep and fire wealth managers
- Why tomorrow's client is likely to be more mobile
- Creating an effective communications strategy will be key to success for wealth managers
- The top business challenges and opportunities according to senior wealth executives
- The 10 crunch issues that will shape the wealth industry over the next two years

The research report is available only in hard copy and will allow you to:

- Benchmark your strategy and views against those of peers and clients
- Gain an independent insight into the attitudes of high net worth individuals
- Access valuable marketing collateral for internal and external presentations
- Assess your team's performance during the financial crisis against that of rivals
- Discover the strategic priorities of wealth management industry leaders

Place your order today

Please complete the form below and fax to
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I would like to order _____ copies of 'Wealth Management After the Crunch' at £250 per copy (currencies will be converted at the market exchange rate).

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