



Wealth Management Hyperloop: Digitizing the Path from Client Profile to Portfolio Management

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This report focuses on the front office, the center of client-adviser interaction. It highlights the complexity of the portfolio construction process and its inexact link to most risk profiling exercises. At the same time, it offers recommendations for driving coordination and engagement across the entire client lifecycle, outlining the role of technology in transforming a disjointed and labor-intensive workflow into a synchronized and scalable process.

Key questions discussed in this report:

- What steps define the advisory process, and what is their logical interaction and cadence?
- What operational tasks must the adviser fulfill?
- What factors inhibit adviser line of sight and alignment with client interests, and what is their impact on the workflow?
- What are the ramifications of these shortcomings from a client, adviser, and enterprise standpoint?
- How can profiling, portfolio construction, and planning efforts be kept in sync and up to date?

Companies Mentioned: Andes Wealth, Appway, Bessemer Trust, BlackRock, BMC Software, Cetera, Credit Suisse, Morgan Stanley, MSCI Barra, Oxford Risk, Nedbank, NexJ, NVISO, Qontigo, Raymond James, Riskalyze, Robinhood, Tolerisk, Totum Risk

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