



Hybrid B2B Robo Takes Flight

27 July 2021 By: William Trout, Daniel Gonzalez

If digital wealth management advice is to find its home within a broader bank ecosystem, it must become much more client-centric. This means moving past the business silos that have built up amid internal rivalries and a fragmented regulatory environment that are unfriendly to the client experience.

Instead, the focus should be on fully integrated platforms that complement—but do not displace—the existing superstructure of the bank. This digital integration can be extended to document vaults, chat, aggregation, financial planning and other third-party tools to support a streamlined workflow and help advisors fortify relationships with clients and give those customers a pleasing, supportive wealth management journey.

Key questions discussed in this report:

- How can banks integrate the savings and wealth journey?
- How can digital advice platforms support an exceptional client and advisor experience?
- What do banks need to do to align digital advice to the requirements of the branch environment?

Companies mentioned: Access Softek, Ally Bank, Amerant Bancorp, ATB Financial, Bank of America, BlackRock, Charles Schwab, Citizens Bank, eMoney Advisor, Envestnet, Fidelity Investments, Fifth Third Bank, First Horizon Bank, Harvest Savings & Wealth, intelligiflo, Key Bank, Marstone, MX, National Bank of Canada, Principal Financial, RobustWealth, Scotiabank, SigFig, TD Bank, Truist Bank, Wells Fargo Bank

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