

SIX PRINCIPLES OF A DIGITAL-FIRST MINDSET

FOR WEALTH MANAGEMENT FIRMS

Emphasize Digital-First Culture



Firms that embrace a digital-first culture are constantly considering the digital effects of their choices and ensuring that the firm moves forward and provides the best service possible for advisors and clients.

PRINCIPLE

01

PRINCIPLE

02



Evolve Human Behavior

Changing human behavior around the new mindset starts by showcasing the value-add of digital solutions.

Implement Proactive Training



Successful firms make training a regular part of their digital efforts, including teaching employees and advisors the essential features of digital solutions and how they can be used.

PRINCIPLE

03

PRINCIPLE

04



Champion Cloud Migration & Data Storage

Moving client data to the cloud increases efficiency and scalability, while also making it more secure to outside threats and more accessible internally.

Integrate Emerging Technology



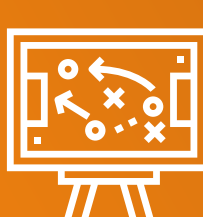
Be able to easily paint a clear picture of where each client is in their lifecycle, how they are progressing towards their financial goals, and how an RIA can best serve and advise that client.

PRINCIPLE

05

PRINCIPLE

06



Strategize Operations

Operations is where the rubber meets the road, and when a digital-first mindset can truly transform how a firm works and grows.

Ready to Digitize Your Firm?

Discover Docupace at docupace.com or call (888) 508-1996.

