

Four Trends Driving Growth in Wealth Management for 2022

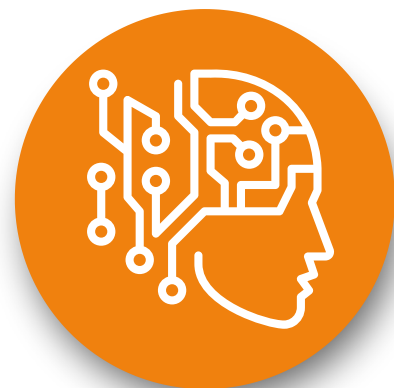


Digitally Enabled Client Onboarding

Firms must focus on reframing their onboarding process to be more client-centric, streamlined, and most importantly, integrated. Companies focused on digitization say they have 39% of their revenue through digital channels and expect that percentage to rise to 59% in 2022.

AI-Powered Tools to Support Clients and Employees

AI-powered technology can reduce repetitive tasks and help free up time for financial planners and the teams that support them to focus on activities that drive growth for their firms and value for their clients.



Emerging Fintech (Including Blockchain) Will Lead the Way

Firms will need to find fintech partners that support their end-to-end business—from onboarding to asset expansion. New workflows will need to be established to support emerging technologies, like Blockchain and crypto.

Cybersecurity and Compliance Come First

To be secure, wealth management firms must focus on building out the right security architecture, training their staff to be cyber smart, leveraging tools that will help deter hackers, and meeting current and future regulatory requirements.



Docupace has the tools needed to meet 2022's trends, including digital customer onboarding, automated solutions for your employees, and built-in compliance.

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