

# 5 WAYS

## to Modernize Your Financial Firm in 2025



### 1 INVEST IN TECHNOLOGY

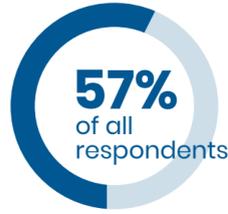
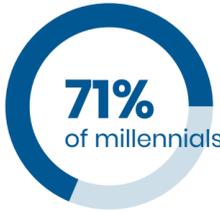
**74% of CEOs** say technology is a growth enabler or source of competitive advantage.[1]



Modern clients expect digital tools that make managing finances effortless. Equip your firm with customer-facing dashboards, video conferencing and automated workflows.

### 2 OFFER HOLISTIC ADVISING

**71% of millennials** and **57% of all respondents** prefer to do their financial business at one institution.[2]



Clients increasingly want access to a variety of financial services in one place. Providing a holistic approach—including tax, estate planning and insurance—creates value and loyalty.



### 3 FIND A NICHE



**Advisors who develop a niche can increase marketing efficiency and scale their practices more effectively.**[3]

Specializing in a niche allows advisors to attract more clients by catering to their unique needs. Whether it's helping retirees, young professionals or small business owners, niche expertise builds trust and credibility while setting advisors apart in a competitive market.

### 4 PRIORITIZE THE CLIENT EXPERIENCE

**66% of clients** say personalized advice is a key driver of satisfaction.[2]



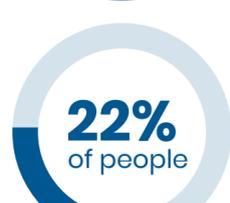
Personalize every interaction to build stronger relationships and earn client loyalty. Stand out by delivering high-quality, tailored financial plans.

### 5 BE A SUBJECT MATTER EXPERT

**93% of clients** say trust is the most important factor when choosing a financial advisor. [4]



**22% of people** are dissatisfied with their financial advice because it is too complex to follow.[2]



Sharing expertise builds trust and credibility with clients. Providing educational resources and simplifying complex financial topics helps clients feel more confident in their decisions.

[Visit Docupace.com to get started](https://www.docupace.com)

Docupace is the leading solutions provider revolutionizing the financial advice and investment industry by digitizing and automating operations. Its cloud-based, integrated platform helps financial services firms cut back-office costs, streamline workflows, enhance advisor and investor experiences and strengthen recruitment efforts. Get started at [Docupace.com](https://www.docupace.com).

#### Sources for Stats

1. Accenture: "Mapping the DNA of M&A Value Creation" ([accenture.com](https://www.accenture.com))
2. eMoney Advisor: "What Do Clients Want from Their Financial Advisor?" ([emoneyadvisor.com](https://www.emoneyadvisor.com))
3. Kitces: "The Benefits Of Niche Marketing For Financial Advisors" ([kitces.com](https://www.kitces.com))
4. Investopedia: "Trust Is a Financial Advisor's Most Important Asset" ([investopedia.com](https://www.investopedia.com))