

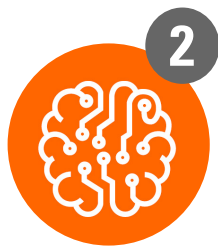
Emerging Technology Trends in Wealth Management



1

Robotic Process Automation Is the New Invisible Workforce

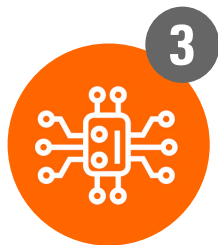
Programming machines to perform repetitive tasks normally carried out by humans is the cornerstone of robotic process automation (RPA). Wealth management applications include client onboarding, account rebalancing and reconciliation.



2

Artificial Intelligence (AI): The Next Frontier

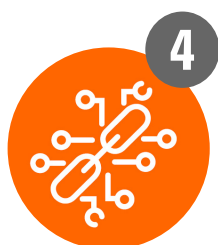
Artificial intelligence takes RPA to the next level with advanced algorithms that allow machines to become self-learning and perform tasks that require human intelligence. Wealth management applications include education and financial literacy, portfolio management and financial planning.



3

Data and Service as an Integration Layer

The foundations of a data strategy include data management and controls, continuous business intelligence and business situation awareness. Wealth management applications include creating tools for advisors and service teams that encompass past client interactions across all channels and business processes.



4

Distributed Ledger Takes Further Prominence

Blockchain is an evolution of current technologies, not a revolution. As a purpose-built distributed ledger, it allows for virtually anything of value to be transparently traded, tracked and verified. Wealth management applications include smart contracts, client data and preferences and trade processing.



5

Digital Identification (ID) Becomes a Reality

The need for security, convenience and scalability with minimal interaction is an argument for the use of digital IDs from a single repository. Wealth management applications include accessing know your customer (KYC) data, goals and financial plans.

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