

Wealth Management Blueprint

Version 3

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Summary

This document outlines how global wealth management firms can protect their existing customer bases from emerging new competitors. It shows them how interconnection and colocation can help them differentiate their offerings in the marketplace, reduce risk and scale the business through digital ecosystems. Finally, it explains how a single, globally distributed platform enables them to take advantage of emerging global opportunities while providing a high-caliber, client-centric approach to managing wealth.

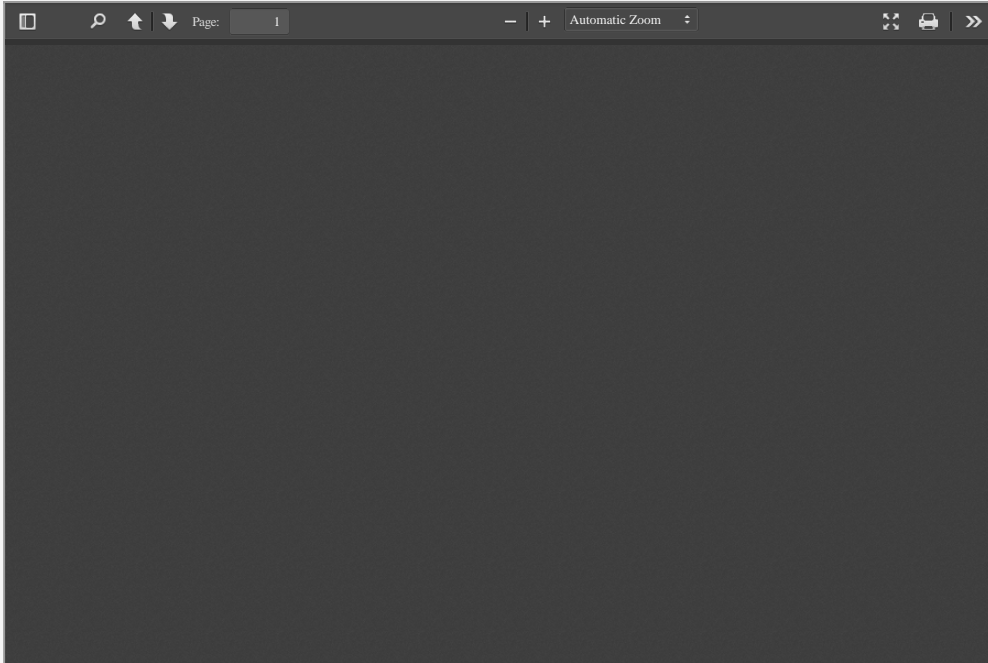
Your situation

To compete, global wealth management firms must meet customer demands for sophisticated, personalized and seamless experiences. They must provide self-directed services and tailored advice supported by real-time insights via an array of channels. By re-architecting IT infrastructure on a globally distributed interconnection platform, wealth management firms can integrate advanced analytics and cognitive technologies, enable dynamic partner collaboration, optimize operations and rapidly test new business markets and models for a matchless customer experience.

Capabilities include:

- Hybrid engagement models – Dynamic integration of personalized advice and intelligent portfolio features.
- Geographic scalability – Global delivery of tailored solutions in proximity to clients.

- Speed to market – Enhanced collaboration between wealth managers, investors and partners.
- Data-driven advisory – Information integrated with AI for real-time, customized client advice.



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