

TRENDS

RESHAPING PRIVATE BANKING & WEALTH MANAGEMENT



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GROWING MOMENTUM BEHIND INDEPENDENT AND RIA MOVES

Why:

Advisors are increasingly drawn to greater autonomy, improved economics, and the ability to offer clients more transparent, customized solutions.

Trend:

Traditional wirehouse advisors are making the leap to independent firms and Registered Investment Advisors (RIAs), lured by attractive transition packages, enhanced tech infrastructure, and the freedom to build client-centric practices.



EMPHASIS ON DIVERSITY, EQUITY & INCLUSION (DEI)

Why:

The client base is increasingly diverse, and firms aim to mirror this diversity to build trust, strengthen client relationships, and capture new market opportunities.

Trend:

Firms are strategically recruiting women, minority professionals, and bilingual advisors, with a particular emphasis on wealth hubs in Latin America and the Asia-Pacific region.



SHIFT TOWARD YOUNGER ADVISOR DEMOGRAPHICS

Why:

An aging advisor workforce is creating a disconnect with younger clients, who increasingly seek generational alignment and relatable guidance.

Trend:

Firms are prioritizing the recruitment and development of millennial and Gen Z advisors to:

- Better connect with younger investors
- Build lasting client relationships
- Support the ongoing transfer of wealth across generations