

# TIPS FOR WEALTH MANAGERS TO FUTURE-PROOF THEIR ADVISORY MODEL



BNP Paribas Corporate and Institutional Banking and Scorpio Partnership are proud to present the second part of the Empowered Investor report.



**1,000+**

APAC HNWI's were surveyed in Part I, which uncovered a new investor profile - the Empowered Investor - characterized by advanced interest in execution - only services and sophisticated platform demands.

Part II continues the conversation by exploring the changes that wealth managers should make to address this new investor profile, and future-proof their current advisory model.



## KEY STATISTICS ON EMPOWERED INVESTORS

**US\$ 9.1 MILLION** average net worth

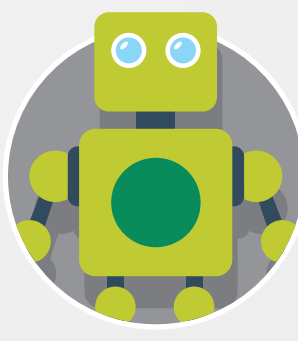
**5** private banks consulted on investment decisions

Typically reward primary provider with **52%** share of wallet

## INSIGHTS FOR WEALTH MANAGERS' DIGITAL AGENDA

**82%** believe the gap between human and robo capabilities has already closed, or is likely to in the future.

ACCELERATE THE USE OF ROBO-ADVISORS



**AUSTRALIAN, CHINESE, INDONESIAN and SINGAPOREAN** investors are particularly interested in personalised investment recommendations, based on portfolio choices of investors with similar wealth profiles (like the Amazon model).

TAKE PERSONALIZATION TO THE NEXT LEVEL



**47%** want to engage in a digital forum in which they can exchange ideas with institutions and individuals (like the LinkedIn model).

PLUG INTO A DIGITAL NETWORK



**38%** would be comfortable paying more to an institution capable of integrating both financial and social impact goals.

LEVERAGE DIGITAL TOOLS TO SHOW BOTH SOCIAL AND FINANCIAL METRICS

Visit <https://cib.bnpparibas.com/> and search for 'empowered investors' or scan the QR code to download The Empowered Investor - Part II.



**IMPORTANT NOTICE:** The information included in this document is confidential and is provided to you for information purposes only. BNP Paribas is not providing any financial consulting service or investment advice to you. You should obtain independent legal, financial and other professional advice and make your own decision as to whether or not you wish to enter into any of those transactions with any person. Any information set out in this document is for reference only and should not be relied upon by you in any circumstances. BNP Paribas shall not have any liability to you or any of your affiliates (whether in contract, in tort or otherwise whatsoever) for any loss, damage, cost or expense that you or any of your affiliates may have suffered or incurred arising out of any of those transactions.

The information in this document has been obtained from published or unpublished sources which Scorpio Partnership and BNP Paribas reasonably believe to be complete, reliable and accurate, neither Scorpio Partnership nor BNP Paribas do represent or warrant, whether expressly or implicitly, and accept any responsibility for, its exhaustiveness, reliability or accuracy; any opinion expressed in this document is subject to change without notice. Scorpio Partnership and BNP Paribas accept no liability whatsoever for any consequences that may arise from the use of information, opinions or projections contained herein. This document does not constitute a prospectus or other offering document or an offer or solicitation to buy any securities or other investment. Information and opinions contained in this document are published for the assistance of recipients, but are not to be relied upon as authoritative or taken in substitution for the exercise of judgment by any recipient; they are subject to change without notice and not intended to provide the sole basis of any evaluation of the instruments discussed herein. Any reference to past performance should not be taken as an indication of future performance. No BNP Paribas Group Company accepts any liability whatsoever for any direct or consequential loss arising from any use of material contained in this document. All estimates and opinions included in this document constitute our judgments as of the date of this document.

This document is prepared by Scorpio Partnership in cooperation with BNP Paribas Hong Kong Branch, a branch of BNP Paribas whose head office is in Paris, France. BNP Paribas Hong Kong Branch is registered as a Licensed Bank under the Banking Ordinance and regulated by the Hong Kong Monetary Authority. BNP Paribas Hong Kong Branch is also a Registered Institution regulated by the Securities and Futures Commission for the conduct of Regulated Activity Types 1, 4, 6 and 9 under the Securities and Futures Ordinance. This document may not be circulated, distributed, reproduced or disclosed (in whole or in part and in any manner whatsoever) to any other person without the prior written consent of BNP Paribas Hong Kong Branch.

For country disclaimers visit: <https://apac-disclaimers.bnpparibas.com/country-disclaimers>

© BNP Paribas 2018. All rights reserved.