

## Wealth Management Market is estimated to be US\$ 6.81 billion by 2030 with a CAGR of 11.50% during the forecast period

Wealth Management Market accounted for US\$ 2.90 billion in 2020 and is estimated to be US\$ 6.81 billion by 2030 and is anticipated to register a CAGR of 11.50%. A wealth management platform is a software system that allows consumers to keep track of their financial portfolios and look for new opportunities. It provides a solution for all of an advising network's requirements. Banks, investment management firms, trading and exchange firms, and brokerage firms all employ wealth management platforms. Wealth management is an investment advisory service that combines investing and financial advice to meet the demands of high-net-worth individuals. It entails developing plans to attain specific financial goals over time, retirement planning, accounting and tax services, estate and legal planning, and generally offering a customised strategy under the wealth services portfolio. These services are typically provided to high-net-worth individuals (HNIs) who have a professional wealth manager who makes fund allocation recommendations to the clients.

**The report " Global Wealth Management Platform Market, By Advisory Model (Human Advisory, Robo Advisory, and Hybrid), By Business Function (Financial Advice Management, Portfolio, Accounting, and Trading Management, Performance Management, Risk and Compliance Management, Reporting, and Others (Billing and Benchmarking)), By Deployment Model (Cloud and On-Premises), By End-User Industry (Banks, Investment Management Firms, Trading and Exchange Firms, Brokerage Firms, and Others (Asset Management Firms and Custody and Compliance Providers)), and By Region (North America, Europe, Asia Pacific, Latin America, Middle East, and Africa) - Trends, Analysis and Forecast till 2030"**

### Key Highlights:

- In 2021, Wealth Practice 360 has been launched by Refinitiv. Wealth advisors will benefit from the new product, which has been designed to streamline workflows and give improved customer insights. This new set of services brings together client data from a variety of sources, including a firm's CRM, financial planning, social media, and market data.
- On September 10, 2021, the Guangdong-Hong Kong-Macao Greater Bay Area (GBA) officially inaugurated the much-anticipated Cross-Border Wealth Management Connect Pilot Scheme (Wealth Management Connect), which is estimated to generate a combined funds flow of RMB 300 billion (US\$46.5 billion).

### Analyst View:

The worldwide wealth management business is being driven by a surge in demand for alternative investments such as private equity, commodities, hedge funds, real estate investment trusts (REITs), and intellectual property. Furthermore, the introduction of FinTechs (financial technology) has largely altered the wealth management business, and important benefits provided by wealth management, such as assisting in the elimination of financial stress and the creation of financial plans, are contributing to market growth. However, lack of price transparency and increasing costs, as well as rigorous government norms and regulations for wealth management organisations, are some of the challenges.

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**Key Market Insights from the report:**

Global Wealth Management Market accounted for US\$ 2.90 billion in 2020 and is estimated to be US\$ 6.81 billion by 2030 and is anticipated to register a CAGR of 11.50%. Global wealth management platform market has been segmented into advisory model, business function, deployment model, end-user industry, and region.

- Based on Advisory Model, Global Wealth Management Market is segmented into Human Advisory, Robo Advisory, and Hybrid.
- Based on Business Function, Global Wealth Management Market is segmented into Financial Advice Management, Portfolio, Accounting, and Trading Management, Performance Management, Risk and Compliance Management, Reporting, and Others (Billing and Benchmarking).
- Based on Deployment Model, Global Wealth Management Market is segmented into Cloud and On-Premises.
- Based on End-User, Global Wealth Management Market is segmented into Banks, Investment Management Firms, Trading and Exchange Firms, Brokerage Firms, and Others (Asset Management Firms and Custody and Compliance Providers).
- By Region, the Global Wealth Management Market is segmented into North America, Europe, Asia Pacific, Latin America, and Middle East & Africa.

**Competitive Landscape & their strategies of Global Virtual Desktop Infrastructure Market:**

Key players operating in the global wealth management platform market include SS&C Technologies, Inc., Fiserv, Inc., Fidelity National Information Services, Inc., Profile Software Ltd, Broadridge Financial Solutions, Inc., InvestEdge, Inc, Temenos Group AG, SEI Investments Co., Comarch Inc., ObjectWay S.p.A., and Dorsum Ltd.

The market provides detailed information regarding the industrial base, productivity, strengths, manufacturers, and recent trends which will help companies enlarge the businesses and promote financial growth. Furthermore, the report exhibits dynamic factors including segments, sub-segments, regional marketplaces, competition, dominant key players, and market forecasts. In addition, the market includes recent collaborations, mergers, acquisitions, and partnerships along with regulatory frameworks across different regions impacting the market trajectory. Recent technological advances and innovations influencing the global market are included in the report.

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