

CUSTOMER-FIRST STRATEGY

PUTTING THE CLIENT AT THE HEART OF WEALTH MANAGEMENT

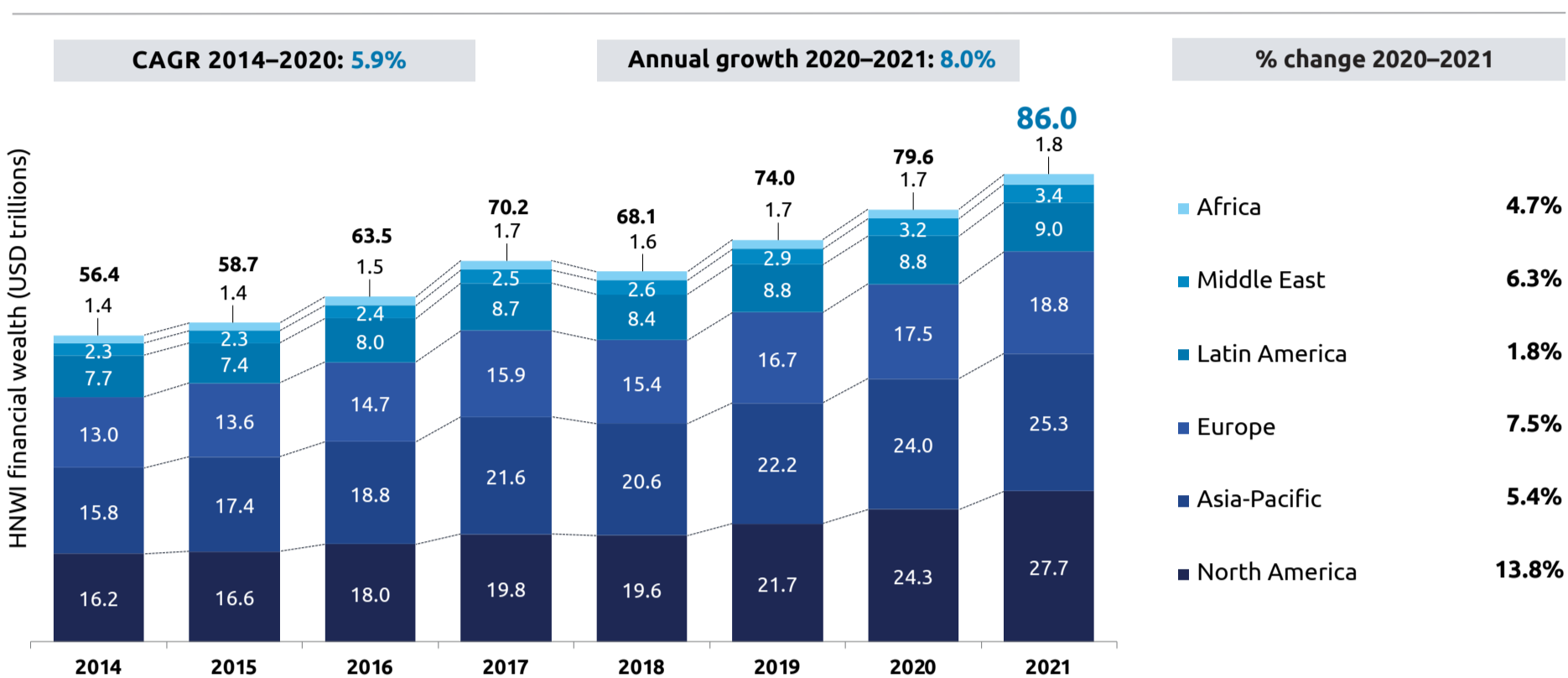


WEALTH MANAGEMENT FIRMS MUST LEVERAGE TECHNOLOGY AND CUSTOMER-CENTRIC STRATEGIES TO ACHIEVE STRONGER CLIENT ENGAGEMENT

EQUITY MARKETS SPURRED GROWTH IN NORTH AMERICAN HNWI POPULATION AND WEALTH

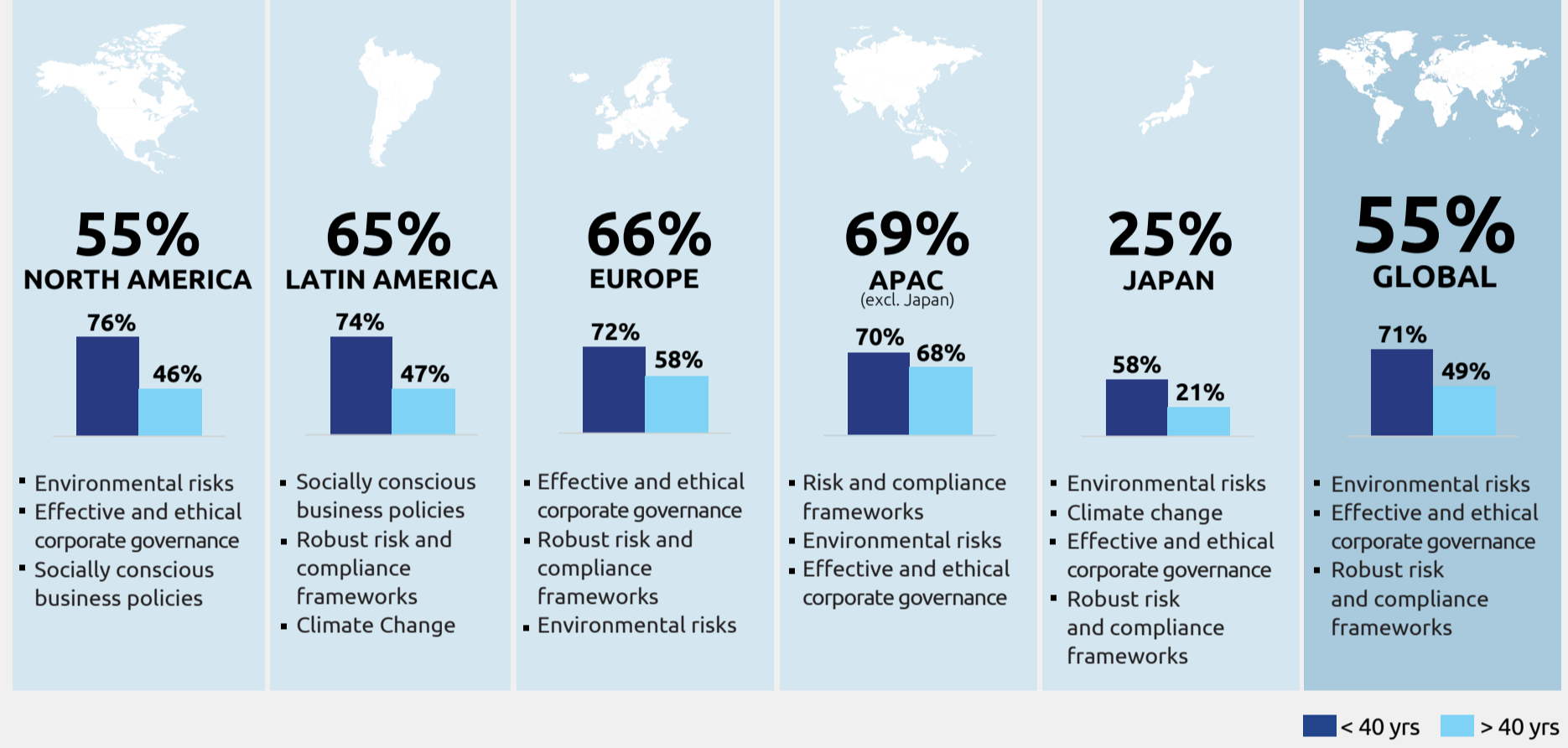
In 2021, North America retained its leadership position in HNWI population (13.2%) and wealth growth (13.8%)

HNWI financial wealth by region



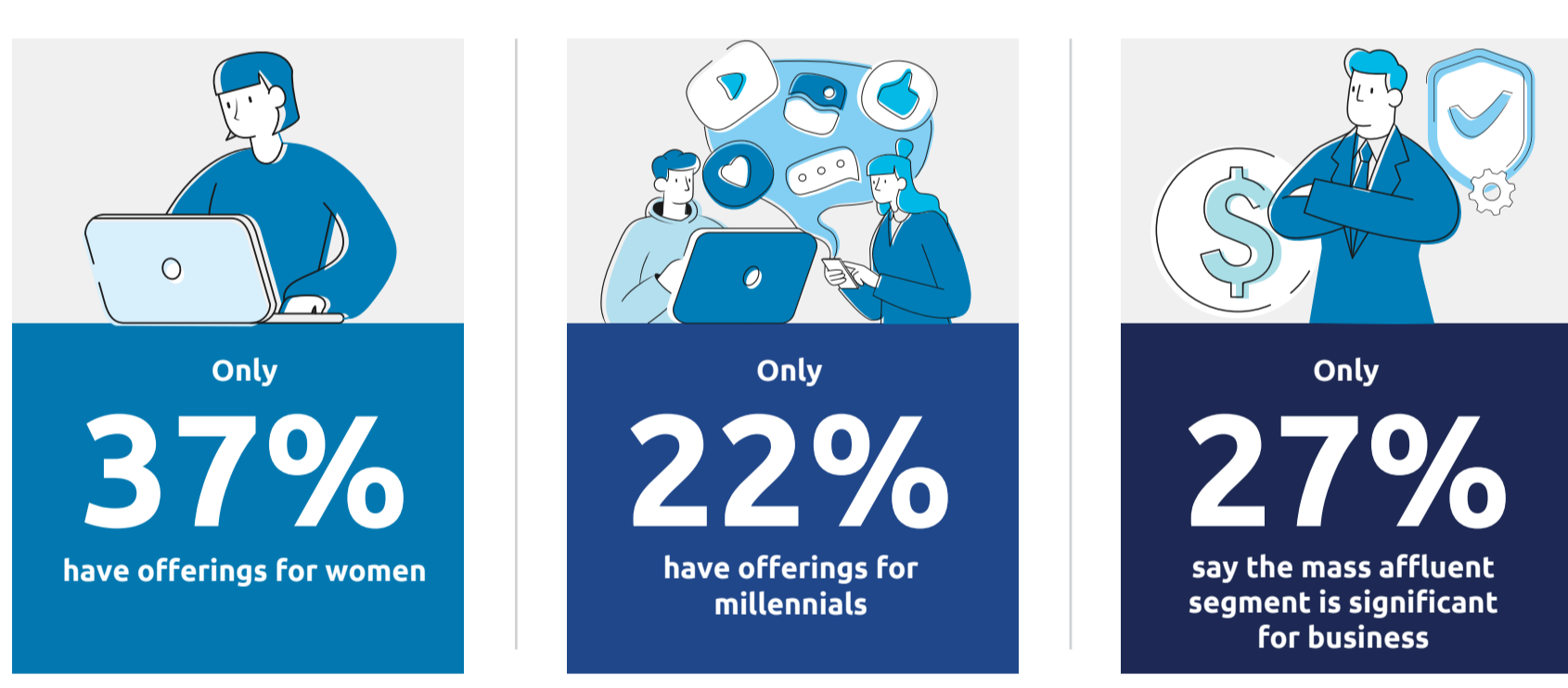
SUSTAINABLE INVESTING IS AN ESSENTIAL PART OF HNWI PORTFOLIO

Globally, 55% HNWIs say positive ESG impact is a critical wealth management objective



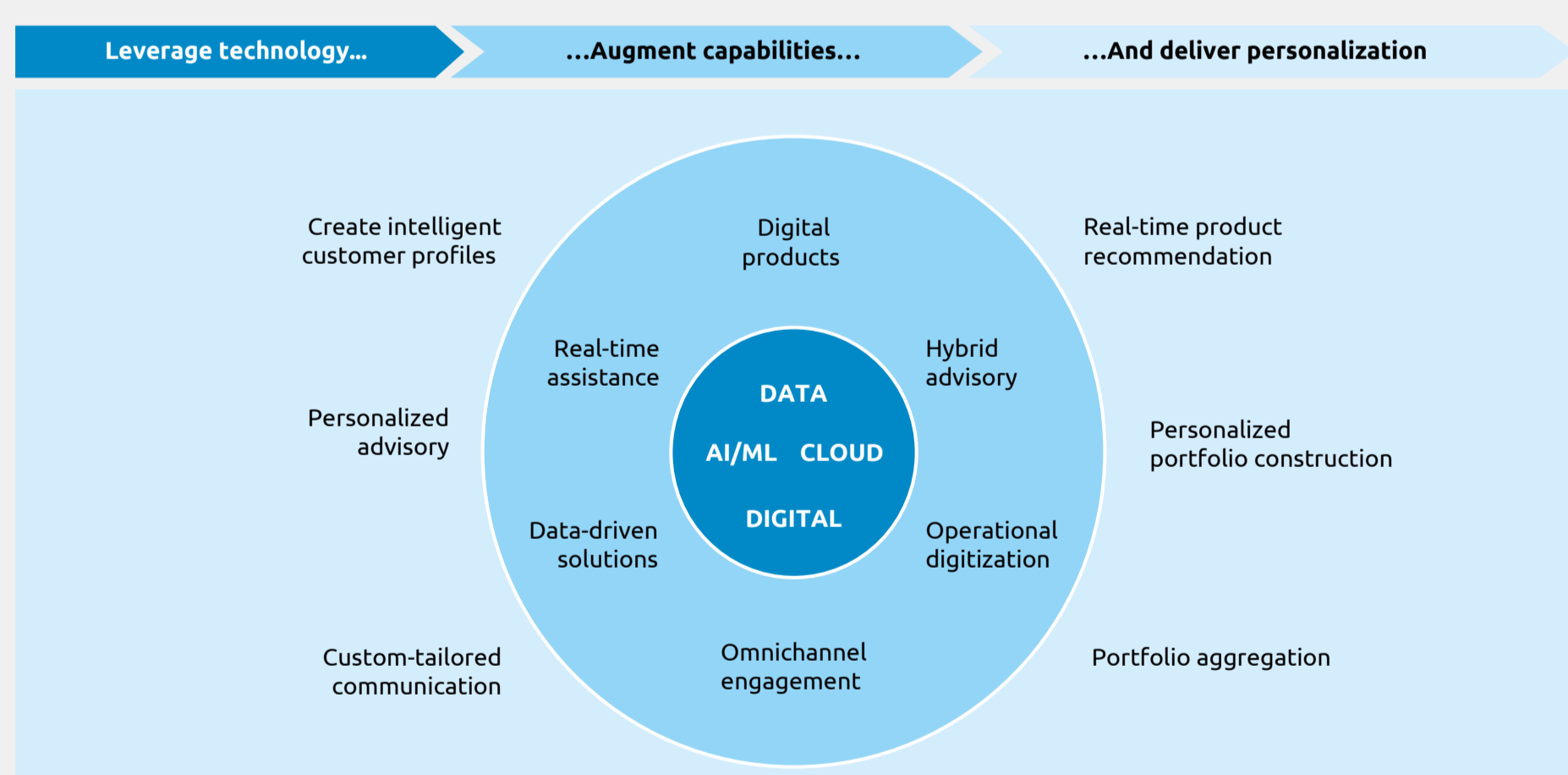
NEW HNWI GROWTH SEGMENTS POSSESS UNIQUE CLIENT NEEDS

Most firms lack segment-specific products and services for new HNWI segments – women, millennials, and mass affluent



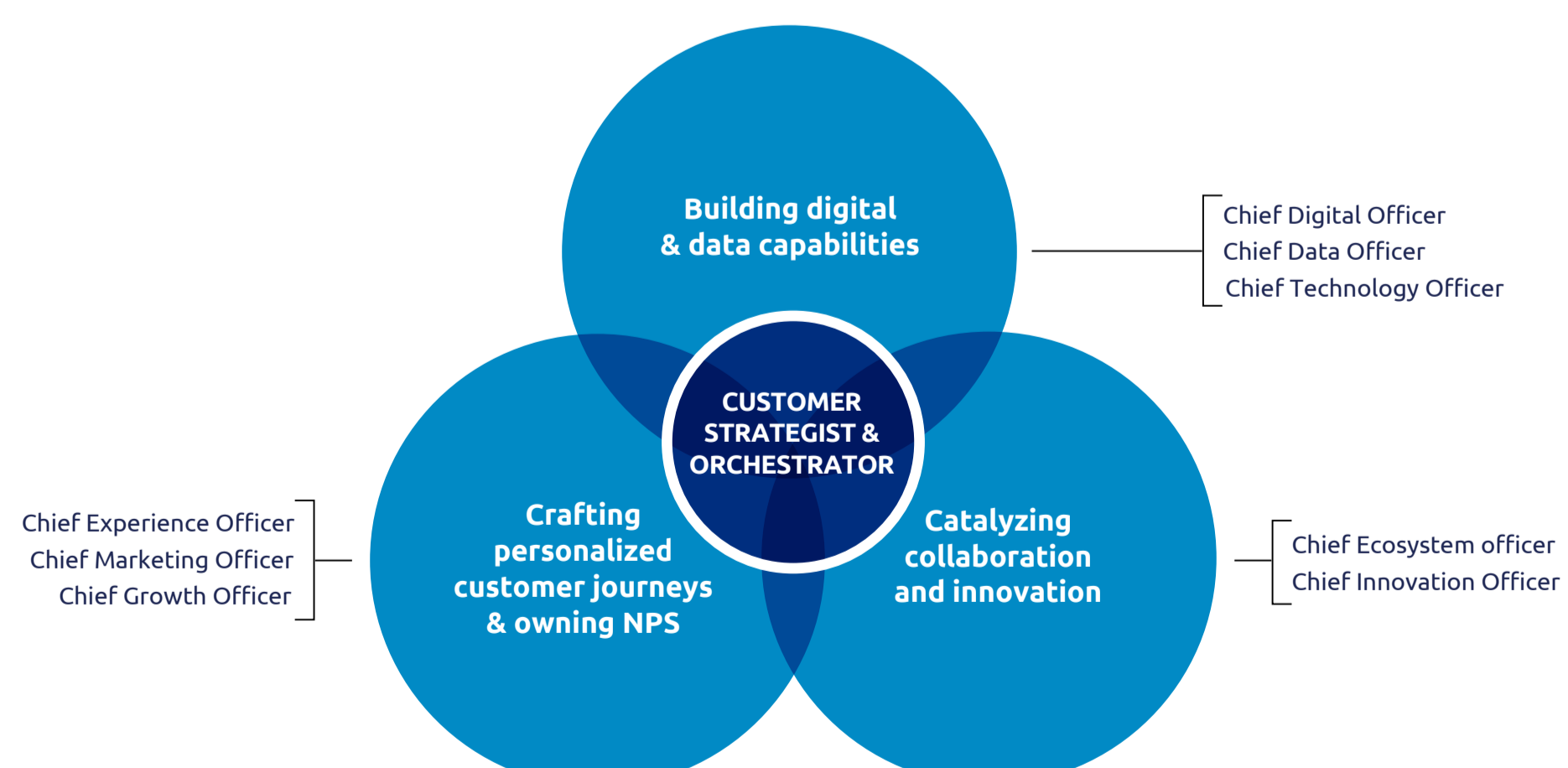
CLIENT EXPERIENCE IS PIVOTAL, PERSONALIZATION WILL HELP FIRMS GROW CUSTOMER MINDSHARE

A robust technology core that leverages data, AI/ML, cloud, and digitalization will be the foundation for a customer-centric model



CUSTOMER ENGAGEMENT REQUIRES C-LEVEL COMMITMENT FROM THE CHIEF CUSTOMER OFFICER(CCO)

The CCO personifies a customer strategist and engagement orchestrator to meet client demands and drive loyalty



A CUSTOMER-FIRST STRATEGY, THAT PUTS THE CLIENT AT THE HEART OF WEALTH MANAGEMENT IS CRITICAL



Download the report at www.worldwealthreport.com.
Reach out to us at wealth@capgemini.com for more information.