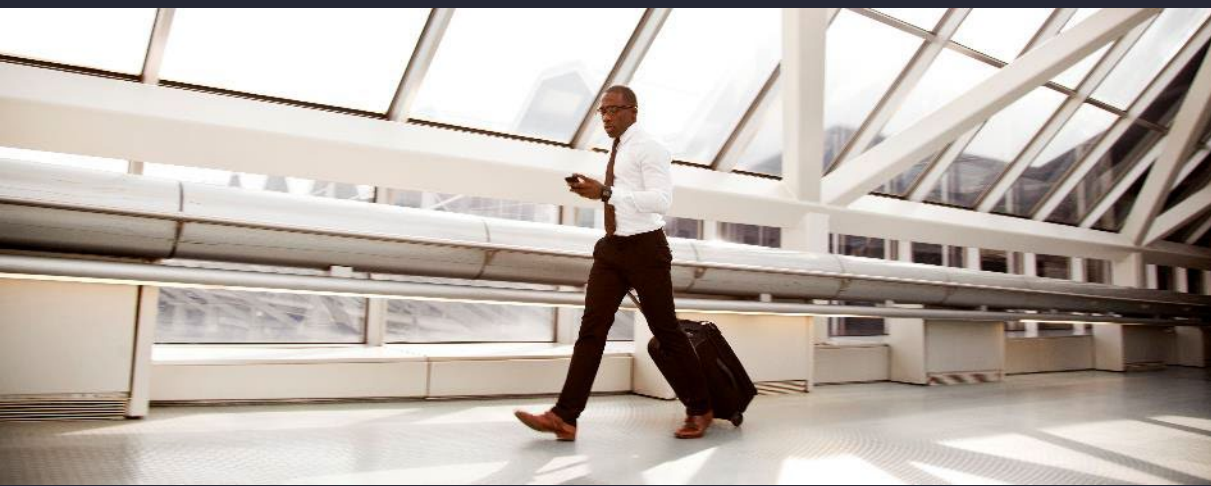


To transform industry challenges into sustainable competitive advantages, wealth management firms will focus on three thematic areas



Customer First

Enterprise Management

Intelligent Industry

In 2025, market dynamics will catalyze...

Wealth management firms can achieve success by...

## Customer First

Seamless, digital customer experience through consolidated services

Hyper-personalized customer experience through data-driven investment strategies

A shift in investment and saving styles as the number of wealth inheritors and young entrepreneurs increases

Strengthening clients' wallet share with personalized solutions through scalable, comprehensive digital platforms

Deploying AI-powered analytical models and thematic recommendations to optimize ways to increase portfolio profitability

Maximizing HNWI value across all age bands by tailoring advice to the next generation, building long-term loyalty and growth

## Enterprise Management

Strategic priorities and demand for niche capabilities, driving inorganic growth as customers seek sophisticated investment options

More complicated performance measurement due to greenwashing concerns and an improved regulatory push for standardized sustainability reporting

Accelerated client acquisition through seamless, digital onboarding solutions

Margin pressures and fragmentation concerns that prompt operational efficiency efforts powered by streamlined digital solutions

Growing assets under management and generating higher fees, as acquisitions help build expertise in private markets

Reporting standardized ESG metrics to combat greenwashing concerns, and build stakeholder trust in sustainability investments while complying with global regulations

Deploying digital onboarding solutions with customer lifecycle management capabilities that ease compliance and boost revenue through white-labeled solutions

Unifying operating models to unlock synergies and deliver consistent experience across geographies, while focusing on core competencies

## Intelligent Industry

More pilots of Gen AI-powered tools to boost relationship manager productivity

Enhanced blockchain adoption in financial markets through increasing tokenization of real-world assets

The exponential growth of AI models that process large datasets from real-time data sources, which will reshape cloud strategies

Deploying Gen AI copilots to achieve significant time savings, helping relationship managers to focus on core activities

Converting real-world assets into digital tokens to enable fractional ownership and better security while potentially reducing transaction costs

Migrating to cloud-native platforms that offer modularity and streamlined workflows while reducing operating costs

### Future focus

In 2025, the wealth management industry is poised for rapid change driven by evolving customer expectations, technological advancements, and shifting risk landscapes. To remain competitive and enhance customer value, the most successful wealth management firms will prioritize:

- **Customer-centric innovation** by rebuilding experiences and offers through digital processes, to enhance loyalty across clients of all ages and wealth segments.
- **Process efficiency** through shifts in their operating models and investment in advanced technology, such as cloud-native platforms and AI-driven tools, to streamline processes and scale effectively.
- **Data-driven decision-making** and security, as firms are building capabilities for real-time insight through workflow optimization, modernizing data infrastructure, and investing in robust security systems to prevent breaches.

By embracing customer centricity, digital transformation, and innovation, wealth management firms will better serve their customers while ensuring operational efficiency and regulatory compliance, positioning them for long-term success.



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