

Is the Age of the Bionic Advisor Upon Us?

Use technology to know clients better and grow the business



Managing wealth today is about getting the best from human interactions and technology. Wealth advisors relying solely on old methods will lag behind those that augment their efforts with the power of modern data and analytics.

A recent report from Roubini ThoughtLab, which surveyed 2,000 clients and 500 investment professionals, gives additional insights into what will keep clients happy. Find the full report [here](#).

72% say **customized investment solutions are important.**

Use data and analytics to anticipate investors' needs: offer mortgage advice to newlyweds and information about college savings plans to new parents. Leverage social media such as LinkedIn and Facebook to learn more about clients.

64% want **access to wider investment options.**

Offer a variety of investment choices, including alternative and socially-responsible options.



63% say **greater cybersecurity is a must.**



62% want to be able to **use the latest technology.**

Guard against a data breach by auditing security and compliance procedures quarterly rather than annually.

51% want **responsive, round-the-clock service.**



Use technology to help. For example, by flagging clients based on previous responses to events such as a 2% one-day drop in the S&P 500, advisors can know who needs urgent personal attention at any given time.

40% want **advice that delivers high returns.**

Use analytics to show investors how they perform against peers and what alternative strategies produced superior returns. While advisors cannot control returns, this approach can lead to a discussion about portfolio allocations and product selection.



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