

Adapting platforms to meet the changing needs of clients

Technology has changed how clients want to manage their portfolio. In an exclusive interview with Hubbis, Timothy Searle of Globaleye discusses the latest trends and his firm is reacting

NOT EVERY CLIENT WANTS TO SPEAK to a financial advisor today. Many want to research and make investment decisions over the internet, on their desktops and on mobile devices. Timothy Searle, the chairman of Globaleye, understands that and is creating platforms that enable his clients to manage their portfolios online. This goes to the extent of providing his clients with a button to hit to connect instantly with the advisor.



TIMOTHY SEARLE
Globaleye

Searle believes that advisor intervention is preferred since unadvised assets don't seem to grow at the same rate as advised assets.

To make advisors more efficient, Globaleye has moved the onus of choosing funds from the advisor to a specialist, ensuring that client portfolios are more suited to their risk profile. To help clients get portfolios that exactly match their risk preference, the portfolios are tailored to specific metrics mapped to an individual psychometric risk profile for the client.

Although AI and technology are fast encroaching the financial services space, Searle is confident that Globaleye will retain its industry position due to the company being a very human business. He acknowledges that AI will replace some of the planning elements and some transactional elements from the gamut of services provided to clients, but Searle believes that the actual task of financial planning will be done by advisors, with fintech being there to support it.

Searle believes that advice isn't advice if it isn't trusted and doesn't add value. This demands that his business model is built around these two aspects, which ensures that clients are constantly interacting with advisors to get added value from each interaction. It's also how Globaleye grows its business, as new clients are generally referrals from existing clients who appreciate the advisors' performance.

To ensure the firm continues to provide the best products and services, the company is constantly looking for forward-looking partners who keep up with the trends, which is why, Searle says, Globaleye is always open to conversations with prospective partners. ■