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Re-imagining the Wealth Management Journey

How advisors play a key role

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Chief Product Officer, Evooq

Who we are?

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Enabling **personalized** investment **at scale**

Team

~240

Seasoned professionals

Presence

Switzerland

Singapore

Focus

Private Banking & Wealth Management

Competence

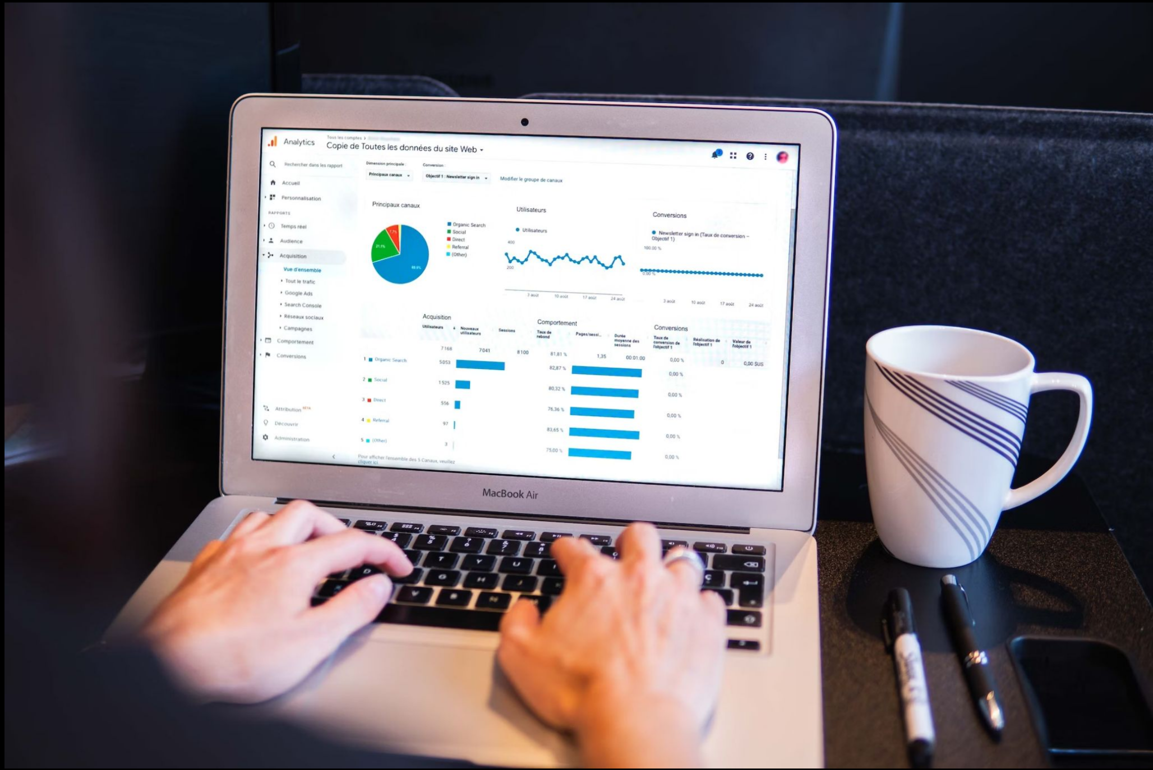
Risk Analytics

Portfolio Construction

Financial products distribution

Investment process optimization

What is the current archetypes across the wealth continuum in Philippines?



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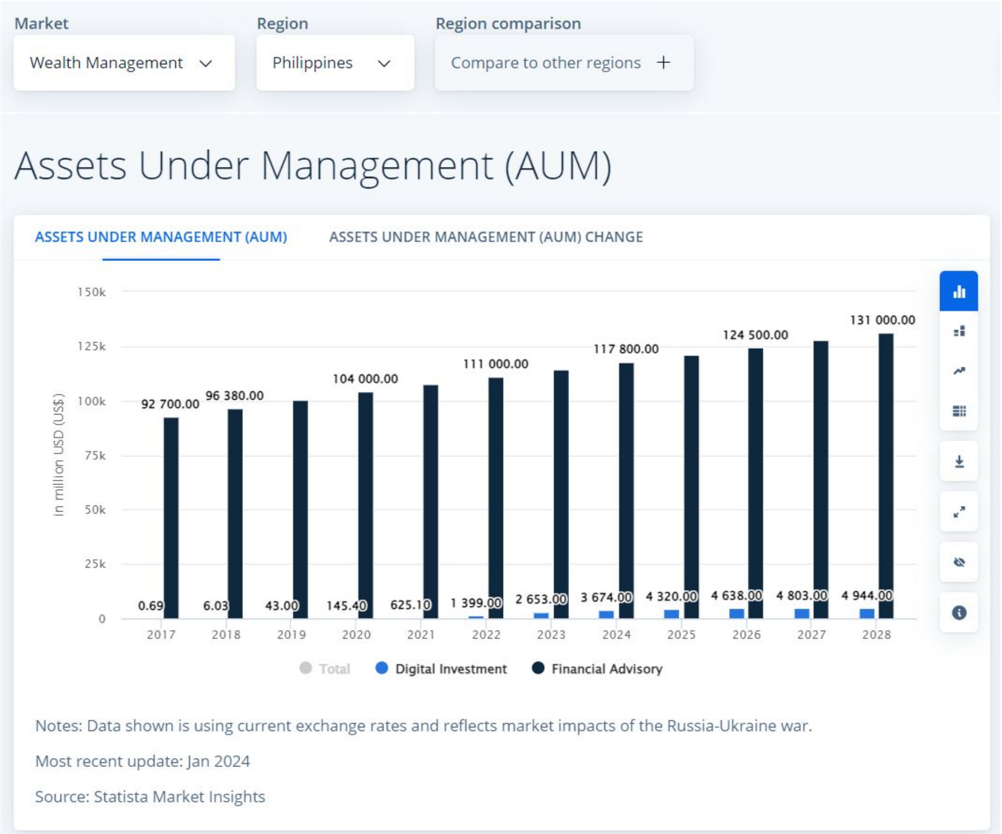
The operating model for Wealth Business is largely **RM driven/focused.**



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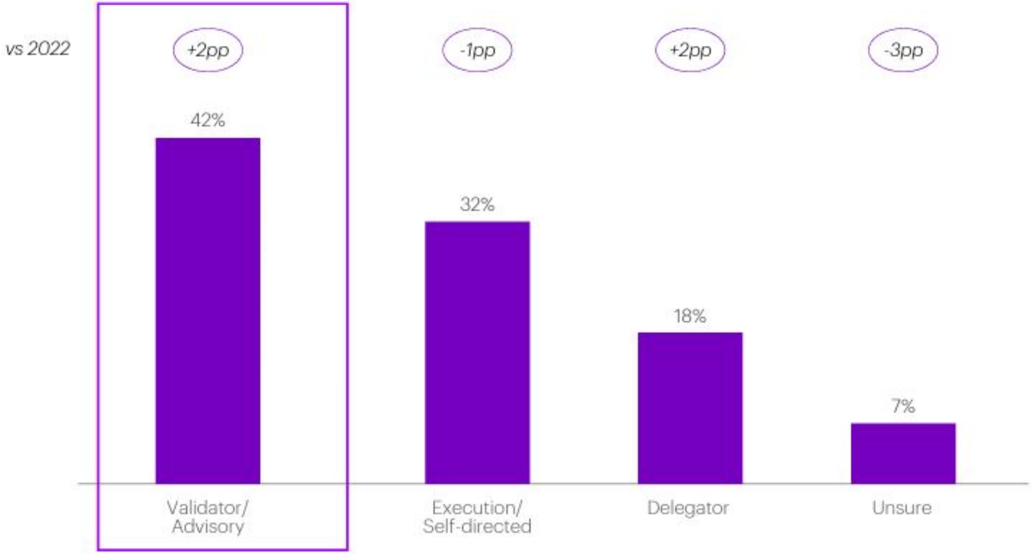
What are the preferences of Asia Wealth management clients?

Most investors in Asia are **validators**.

Figure 3: Once again, most investors in Asia are validators.



Source: Accenture's Asia Affluent Investor Survey, Q1 2023 & Q1 2022 (unless stated otherwise, findings refer to US$100K+ segment)

Question asked: Which of these statements best describes your approach to managing your wealth?

Validator/Advisory represents: "I want to understand investment opportunities and trade-offs to validate with my RM, but I make the decision on whether to invest." Execution/Self-directed represents: "I seek out opportunities in the market and pursue them autonomously." Delegator represents: "I let the bank manage my portfolio and just need to have transparency on my performance." Unsure represents: "I am not fully comfortable investing and managing wealth, and do not yet know the best approach for me to take."

Note: Numbers may not sum due to rounding

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What makes a good wealth management journey and why is it important?

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**“It’s not the destination,
it’s the journey”**

Ralph Waldo Emerson

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Challenges for the Wealth Management sector

1. A **lack of trust** in financial institutions due to “**product pushing**”

2. **Clients’ needs** not met by relationship managers

3. **Talent gap** in the relationship manager space

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Simple

Personalized

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How do we simplify the wealth journey and empower the advisors at the same time?

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Situation

Three core processes at the heart of investment process.

Strategy management	Product management	Client portfolio management
How to allocate the investment	*Which instruments to consider*	*What is the most suitable portfolio*

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Problem

Investment experts use different tools to do their tasks.

Strategy management

Chief investment officer, research analysts

Product management

Product analysts and structuring experts

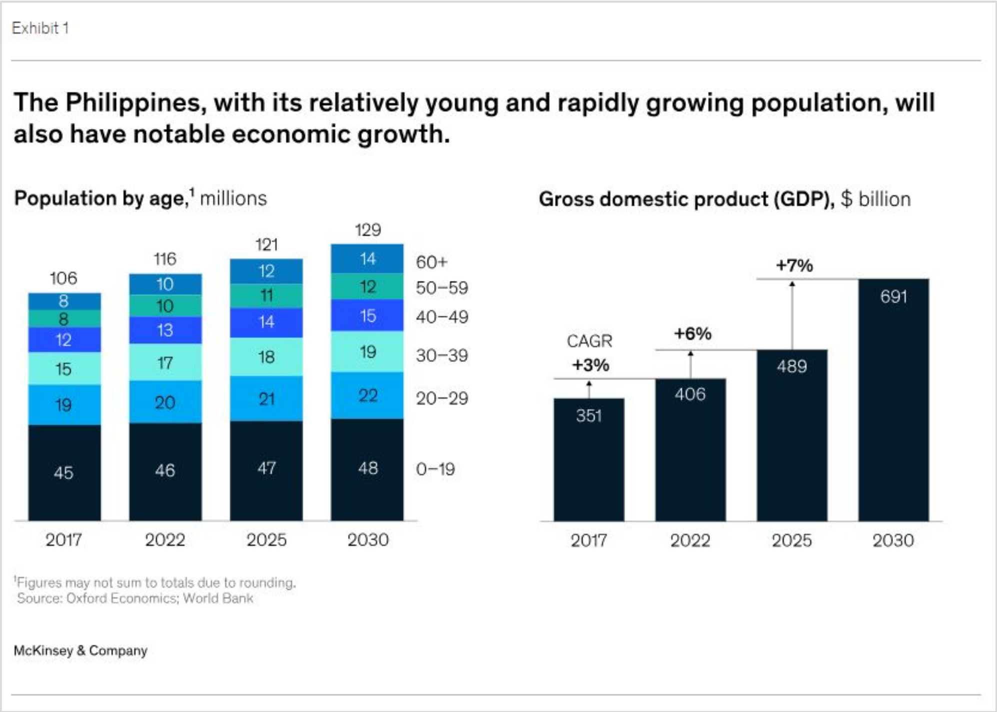
Client portfolio management

Portfolio managers, advisors, relationship managers

Importance of scalability

Projected exponential economic growth of Philippines.

How to empower Advisors to offer personalized advice at scale?



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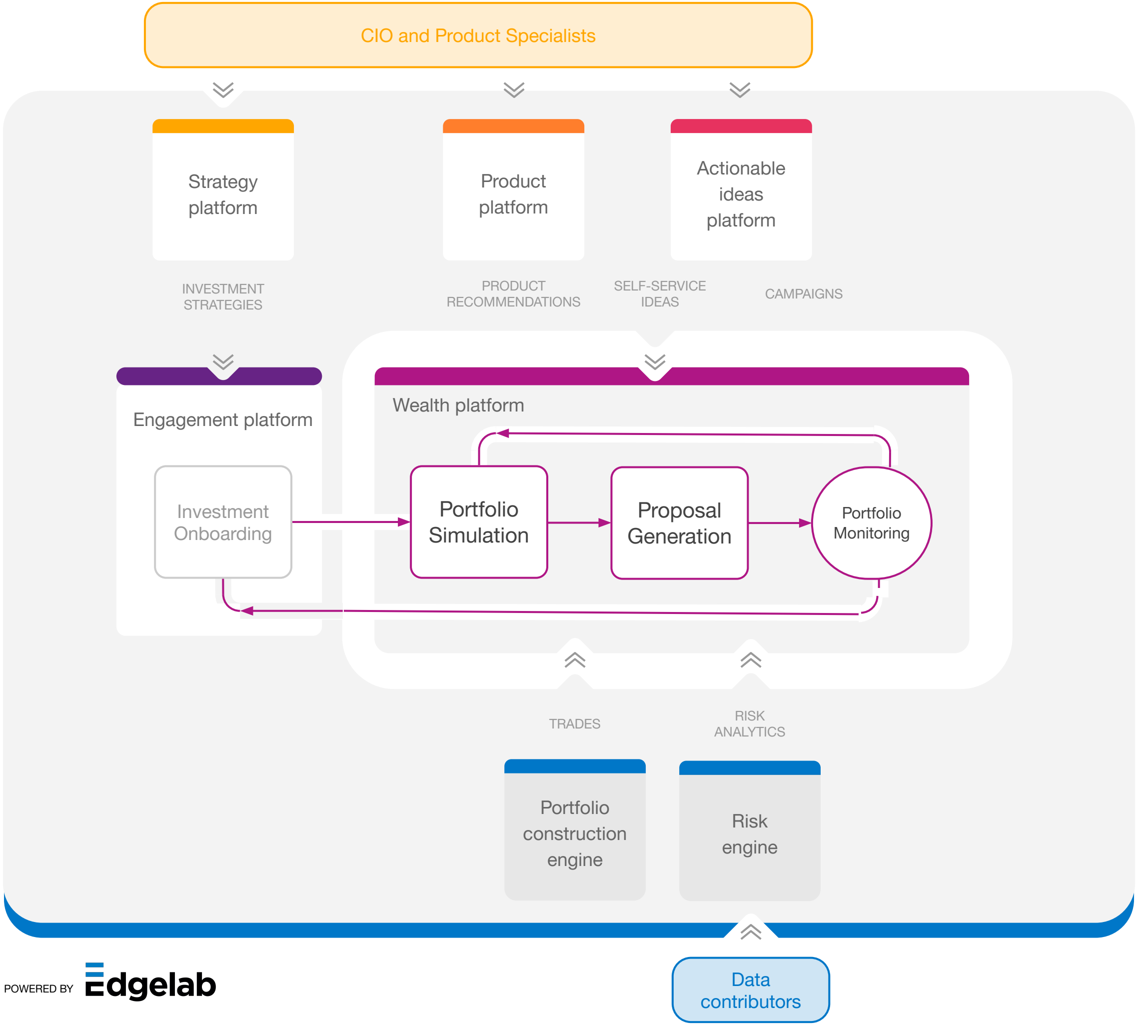
What we offer

An ecosystem enabling **personalization at scale.**



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Summary

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Key takeaway points

1. **RMs are key** to unlock the wealth management potential in the Philippines market.
2. Focus on offering **Portfolio/Goals advisory** instead of product led advisory.
3. Offer **personalized advice at scale** by empowering the RMs with the right tools.
4. Provide the RMs with a simple and guided process for their wealth journey with the clients.

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Thank you

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