

Wealth Management Technology Spending in North America to 2015

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Abstracts

Introduction

This databook provides insight into key technological market dynamics in the North American wealth management technology sector. It quantifies technology spending within the wealth management industry from 2007 to 2009 and then forecasts the spending from 2010 to 2015, covering three business locations, six technology sources, and 15 key business functions spanning four lines of business.

Scope

Overview of wealth management technology spending in North America

Technology spending within the high net worth banking and financial planning line of business

Technology spending within the retail asset management, retail brokerage, and mass affluent banking/financial planning business lines

Highlights

Technology spending within the wealth management industry in North America declined at a CAGR of 3.2% between 2007 and 2009. This is expected to grow at a CAGR of 5.5% over the 2009-15 period.

The retail asset management line of business accounted for the largest share

(35.8%) of total technology spending within the wealth management industry in 2009. High net worth banking and financial planning, and mass affluent banking and financial planning followed, by accounting for 27.7% and 26% shares, respectively.

Reasons to Purchase

Develop business strategies by analyzing the spending patterns among various business functions within the wealth management industry in North America

Gain insight into initiatives and strategies employed by wealth management institutions to remain competitive

Understand market sizes and growth trends for key sub-segments within the wealth management technology sector

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