

# Global Personal Wealth Management Services Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G439E3D84487EN.html>

Date: February 2026

Pages: 169

Price: US\$ 4,480.00 (Single User License)

ID: G439E3D84487EN

## Abstracts

The global Personal Wealth Management Services market size is expected to reach \$ 1696 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

Personal wealth management services are client-centric financial services designed to help individuals and families achieve comprehensive goals such as wealth preservation, appreciation, and intergenerational transfer through professional, systematic, and long-term planning. It transcends traditional single-product sales, integrating investment planning, tax planning, retirement planning, insurance protection, children's education, and estate planning to provide customized solutions covering the entire life cycle. The core process typically includes understanding the client's financial situation and goals, conducting risk tolerance assessments, developing and implementing comprehensive wealth management strategies, and regularly reviewing and adjusting them. Its value lies not only in professional asset allocation and portfolio management but also in helping clients mitigate risks from various economic cycles and market fluctuations, ensuring financial security, and ultimately achieving financial freedom commensurate with their life goals at each stage.

The personal wealth management service market has extremely broad prospects and is entering a golden age of development. The core driving forces are the continued rapid growth of the total investable assets of Chinese residents, the significant trend of residents shifting their assets from real estate to financial assets under the 'housing is for living in, not for speculation' policy, and the enormous demand for retirement planning and wealth transfer brought about by an aging population. Looking ahead, the industry will exhibit three key trends: First, a profound transformation in service models from 'seller-driven sales' to 'buyer-driven investment advisory,' with client-centric account management services and discretionary investment models becoming mainstream. Second, deep digital and intelligent empowerment, leveraging big data and

AI technologies to achieve more precise client insights, personalized solution generation, and intelligent investment advisory services, improving service efficiency and coverage. Third, more comprehensive and ecosystem-based services, expanding from simple financial investment to non-financial fields such as law, taxation, family governance, and philanthropy, providing one-stop solutions. Therefore, institutions that truly understand their clients, possess professional investment research capabilities, and have a comprehensive service ecosystem will win in the market.

This report studies the global Personal Wealth Management Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Personal Wealth Management Services, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Personal Wealth Management Services that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Personal Wealth Management Services total market, 2021-2032, (USD Million)

Global Personal Wealth Management Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Personal Wealth Management Services total market, key domestic companies, and share, (USD Million)

Global Personal Wealth Management Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Personal Wealth Management Services total market by Type, CAGR, 2021-2032, (USD Million)

Global Personal Wealth Management Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Personal Wealth Management Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BNY, Mariner, FNZ, Vanguard, Glenmede, Bernstein Private Wealth Management, Fidelity, Empower, Merrill Lynch, William Blair, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Personal Wealth Management Services market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years

2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Personal Wealth Management Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Personal Wealth Management Services Market, Segmentation by Type:

Financial Planning

Investment Management

Asset Management

Asset Allocation

Estate Planning

Tax Planning

Retirement Planning

Others

## Global Personal Wealth Management Services Market, Segmentation by Target Customers:

Mass Wealth Management Services

Wealth Management for Affluent Individuals

## Global Personal Wealth Management Services Market, Segmentation by Service Providers:

Private Banking Departments of Commercial Banks

Wealth Management Departments of Securities Companies

Third-Party Wealth Management Institutions

Trust Companies and Family Offices

1295.84

## Global Personal Wealth Management Services Market, Segmentation by Application:

Employees

Business Owners

Retirees

Others

## Companies Profiled:

BNY

Mariner

FNZ

Vanguard

Glenmede

Bernstein Private Wealth Management

Fidelity

Empower

Merrill Lynch

William Blair

Raymond James

Charles Schwab

Wealthspire Advisors

Cresset

RBC Wealth Management

Wellsfargo

Northwestern Mutual

LPL Financial

Edelman Financial Engines

Evelyn Partners

EP Wealth Advisors

Coutts

### Key Questions Answered

1. How big is the global Personal Wealth Management Services market?
2. What is the demand of the global Personal Wealth Management Services market?
3. What is the year over year growth of the global Personal Wealth Management Services market?
4. What is the total value of the global Personal Wealth Management Services market?
5. Who are the Major Players in the global Personal Wealth Management Services market?
6. What are the growth factors driving the market demand?

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