

# **Wealth Management Software Market Size, Share & Trends Analysis Report By Advisory Mode (Human, Robo), By Enterprise Size (Large, SMEs), By End-use, By Deployment, By Application, By Region, And Segment Forecasts, 2022 - 2030**

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## **Abstracts**

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### **Wealth Management Software Market Growth & Trends**

The global wealth management software market size is expected to reach USD 12.07 billion by 2030, growing at a CAGR of 13.9% over the forecast period, according to a new report by Grand View Research, Inc. The growth of the market can be attributed to the increasing demand for wealth management software from financial advisors to effectively understand the needs of their clients and streamline the financial management of their clients accordingly. The widening scope of wealth management software to cover everything from accounting and investment management to estate planning and retirement planning bodes well for the growth of the market. Advances in technology and the growing adoption of the latest technologies for wealth management are expected to intensify the competition between traditional and non-traditional firms.

Several wealth management firms across the globe are using Artificial Intelligence (AI)-based applications to offer personalized solutions to their clients. Businesses are particularly adopting predictive analytics tools based on AI and Machine Learning (ML) to analyze the large volumes of data related to investments and forecast future trends. The increasing number of High-Net-Worth Individuals (HNWIs) across the globe is expected to play a niche role in driving product adoption over the forecast period. HNWIs require various services, including investment management services, tax

advice, billing services, and portfolio management services, among others.

Wealth management solutions can potentially help wealth and investment management firms in reducing the manual processes while enhancing investment management for HNWIs. The outbreak of the COVID-19 pandemic is expected to open new growth opportunities for the market over the forecast period. Several businesses and individuals are approaching wealth management service providers to seek investment advice and plan their investments appropriately in the wake of the outbreak of the pandemic. As such, market players are responding to the changing requirements of their clients and diversifying their solutions and services to manage the accounting, estate planning, investment planning, and retirement planning of their clients.

The robo advisory segment is expected to witness the fastest CAGR over the forecast period due to the growing adoption of the robo advisory platform to automate portfolio creation based on the income, risk parameters, and other facets of a client's investment mandate. Robo advisory platform also offers a cost-effective alternative to human advisory services, thereby contributing to the growth of the segment. Several businesses across the globe are focusing on deploying cloud-based solutions to ensure easy access to data and deliver personalized services to their clients. Cloud-based solutions provide several benefits, such as flexibility in payments, reduction in operational costs, and scalability of the system, among others.

### Wealth Management Software Market Report Highlights

The growing number of Small & Medium Enterprises(SMEs) across the globe, and subsequently, the growing preference of these enterprises for modern solutions based on the latest technologies, such as blockchain and AI, are expected to create new growth opportunities for the SMEs segment

Financial advisors are widely adopting financial advice & management solutions to increase productivity, improve workflow efficiency, and strengthen client relationships by helping clients in attaining their financial and investment goals

The trading & exchange firms end-use segment is expected to witness the fastest growth over the forecast period as individuals are aggressively opting for forex and equity trading to augment their financial gains

The growing adoption of wealth management solutions by trading & exchange firms to optimize efficiency and reduce operating expenses also bodes well for

the growth of the segment

The increasing number of SMEs in emerging markets, particularly India and China, is expected to create lucrative growth opportunities for the Asia Pacific regional market

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