

Robo-Advisors - Complex algorithms and AI are proving popular in wealth management

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Abstracts

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SUMMARY

Robo-advisors are a new category of financial service product that can offer some unique benefits to those interested in wealth management services. From start-ups to the biggest incumbent players, most institutions in the wealth management industry have their own services. Companies offering these products are capturing the desire for cheaper monthly rates, advice more heavily based on mathematics and fully impartial advice. Essentially what these companies are trying to provide or what is the long term aim of this type of product, is an AI wealth management service and the robo-advisor market today is a kind of halfway house between a traditional human advisor and what will eventually be the norm, when full AI tools role out in the future.

SCOPE

Learn what a robo-advisor is and what it does.

See the way robo-advisors are being offered and sold as products in the wealth management system.

Examine how peoples attitudes are changing making robo-advisors more viable.

REASONS TO BUY

Robo-advisors are a class of financial advisor that have recently arisen and which provide financial advice or wealth management services with little to no human help or input. Robo advisor is a very broad term and it can refer to any number of investment products that include an element of automation in their processes, this ranges from full account management removing the human element almost entirely, through to more efficiently mechanized systems of moving money in and out of investment portfolios with less human help.

Robo advisor startups make all manner of lofty claims, from saving money over traditional advisors, to being completely impartial and being much better at providing analysis than a traditional advisor. However much of this is not yet actually true.

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Robo-advisor products are those which include some element of automation

Incumbents and startup players prefer different types of products

D2C advisory platforms are the main route that start-ups are using, but incumbents still dominate

Business-to-business advisory services act as a supplemental product

Hybrid advisory services are mainly run by the incumbent big players

Robo advisor products are currently flourishing in developed markets with the US leading the way

Much of the product offering is generally poor and lacking in depth

Restricted advice may mean that ultimately the service is worse

Robo advising may actually be a misnomer, customers are expecting an AI product

Robo advising and digital wealth can't be ignored because some people prefer it

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