

WHY FINANCIAL PROFESSIONALS AND

FINTECH

CAN THRIVE TOGETHER



Financial technology (fintech) shouldn't be viewed as a threat. In fact, it can be a value-add your firm offers.

FINDING A BALANCE

78%

of US adults think their finances should be managed by a financial professional AND tech-based tools

88%

of US adults think human financial professionals are important, and technology should only complement them



TECH IS STILL LIMITING

36%

strongly disagree that robo-advisors could replace human ones in financial planning

5%

believe it's possible to have their finances completely managed by tech-based tools



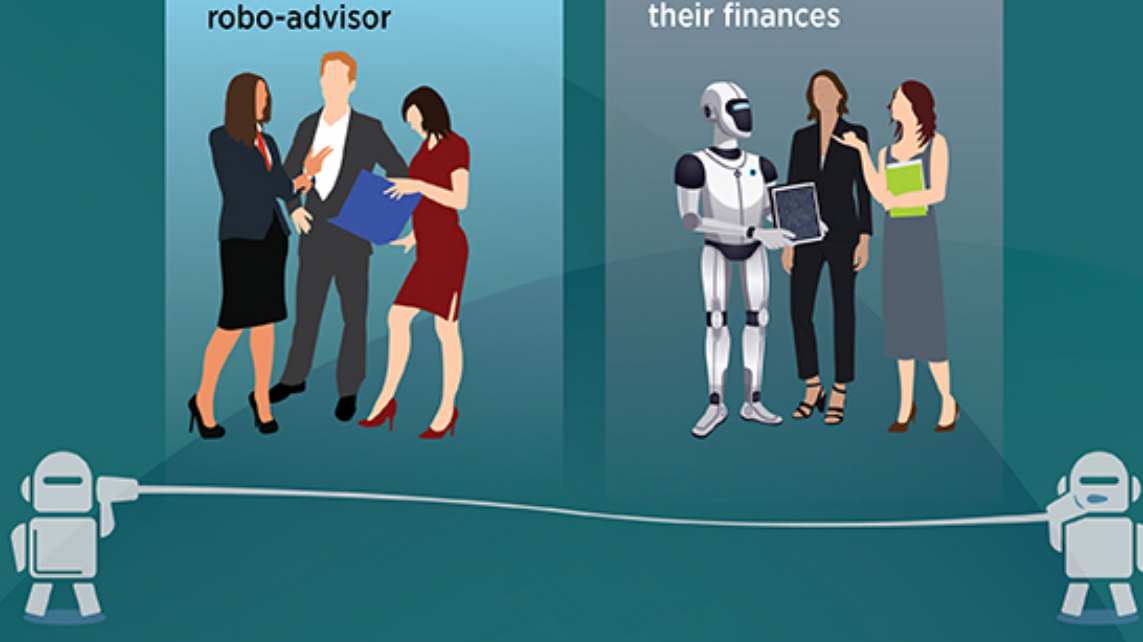
HUMANS > ROBOTS

85%

prefer human financial planners compared to a robo-advisor

36%

would trust robo-advisors to successfully manage their finances



THE BEST OF BOTH WORLDS

(DEPENDING ON THE CLIENT)

HUMAN FINANCIAL PROFESSIONALS



65% prefer to establish trust and build a relationship

58% prefer the high level of human interaction

52% like the ease of communication



TECH-BASED SOLUTIONS



49% like the reduced risk of human error

31% like that there's minimal human interaction

19% prefer the ease of communication



GAINING A COMPETITIVE EDGE WITH TECHNOLOGY

CONSUMERS WITH A HUMAN FINANCIAL PROFESSIONAL FIND IT IMPORTANT THAT THEY USE...

94%

80%

72%

71%

FINANCIAL MODELING SOFTWARE

CLOUD TECHNOLOGY FOR STORING/ACCESSING CLIENT PLANS

AN ONLINE PLATFORM FOR APPOINTMENT SCHEDULING

E-NEWSLETTERS & SOCIAL MEDIA FOR COMMUNICATION

BUT... LESS FINANCIAL PROFESSIONALS ACTUALLY USE THESE TOOLS

48%

48%

32%

33%