Financial Planners & Investment Advisers

Description: Brief Excerpt from Industry Overview Chapter:

Companies in this industry provide customized investment advice and financial planning services. Major companies include US-based Ameriprise Financial and AXA Financial (a subsidiary of France’s AXA), as well as AMP Limited (Australia), IGM Financial (Canada), and units of diversified financial services companies such as Morgan Stanley (US).

Globally, companies providing financial planning and investment advice have about $75 trillion worth of assets under management (AuM), according to the Boston Consulting Group. Global AuM is forecast to exceed $100 trillion by 2020, with nearly half residing in North America, according to PricewaterhouseCoopers. In North America AuM is predicted to grow at a compound annual rate of 5.1% through 2020 to more than $49 trillion (from a 2012 total of $33.2 trillion), exceeding expected AuM for Europe, Asia/Pacific, and the Middle East and Africa combined.

The US industry includes about 16,000 establishments (single-location companies and units of multi-location companies) with combined annual revenue of about $35 billion.

Competitive Landscape

Demand is driven by consumer income and wealth and demographics. The profitability of individual firms depends largely on effective marketing. Large companies have some advantages in providing expertise in a wider range of investment options, and they may be able to charge lower fees. Small companies can compete successfully by providing better service and advice.

Contents:
- Industry Overview
- Quarterly Industry Update
- Business Challenges
- Business Trends
- Industry Opportunities
- Call Preparation Questions
- Financial Information
- Industry Forecast
- Web Links and Acronyms

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