The Rise of Crowdfunding: Threats and Opportunities for the Global Wealth Management Industry

Description: The report answers the following questions of interest to wealth managers, banks, fund managers, crowdfunding platforms, and IT vendors and consultants:

- What is the current involvement of private banks and wealth management firms in the crowdfunding market and how will it develop over the next ten years?
- What impacts, opportunities and threats do the main crowdfunding sectors - donation and reward-based crowdfunding, marketplace lending, P2B lending and equity crowdinvesting - have for wealth managers?
- What are the backgrounds, key facts, strengths and weaknesses of the 14 leading crowdfunding platforms specifically targeting wealthy investors worldwide?
- What are the features, strengths and weaknesses of three support infrastructure solutions that are highly relevant for the implementation of crowdfunding platforms?
- How to get involved in crowdfunding as a wealth manager? Make, buy or partner?
- Which features and functions should crowdfunding solutions have to satisfy clients’ needs? How should crowdfunding platforms improve their offerings?
- What are the implications of the crowdfunding model for traditional wealth managers? How can they counter the threats? How can they benefit?
- Where will crowdfunding in wealth management go? What will the next trends be?

Main Content:

- How existing wealth managers respond to the threats and opportunities presented by crowdfunding companies.
- Interfaces and tools that crowdfunding platforms use to enroll clients and how they manage their investments and risk tolerance.
- 14 in-depth profiles of crowdfunding platforms of relevance to wealth managers covering the US (6), the UK (5), Switzerland (3), France, Germany, Egypt, Israel, the United Arab Emirates and other African, Asian and European countries.
- Detailed analysis and evaluation of each crowdfunding platform, including specific learning points for wealth managers.
- Analysis and evaluation of three leading vendors and service providers for technology used by crowdfunding platforms and a detailed evaluation of their offerings.
- Recommendations on how crowdfunding platforms can improve their value proposition to win more wealthy clients.
- Identification and detailing of strategic options for wealth managers on how to benefit from crowdfunding and counter threats.

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