



175 survey respondents on the biggest obstacles to accessing next-gen clients:



107 misconceptions about the value of financial advisors



44 marketing to the correct audiences

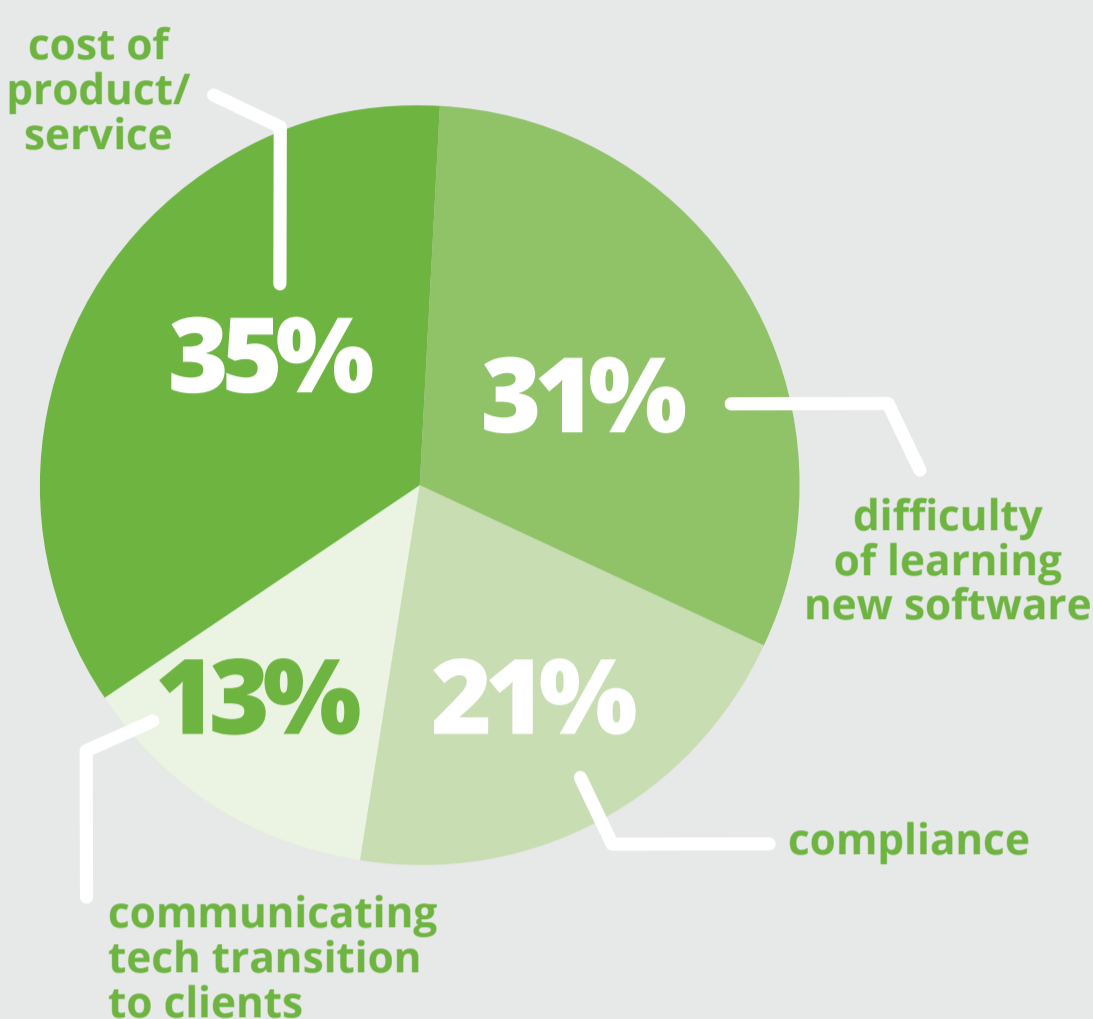


13 growth of robo-advisory products



11 market conditions or lack of one-stop solutions

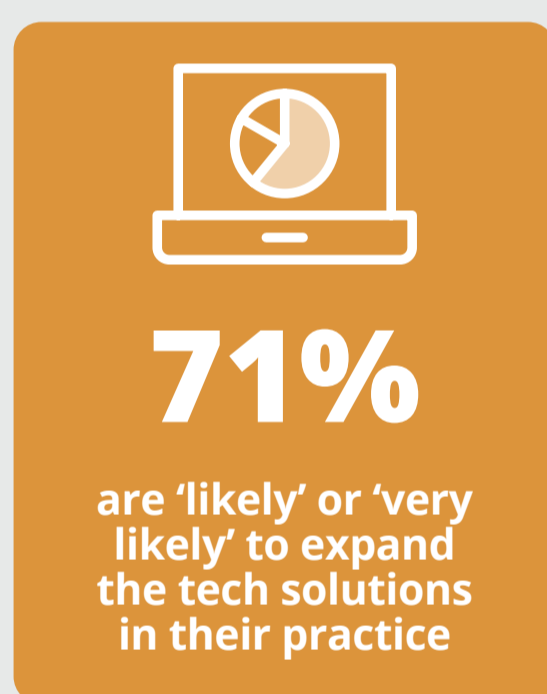
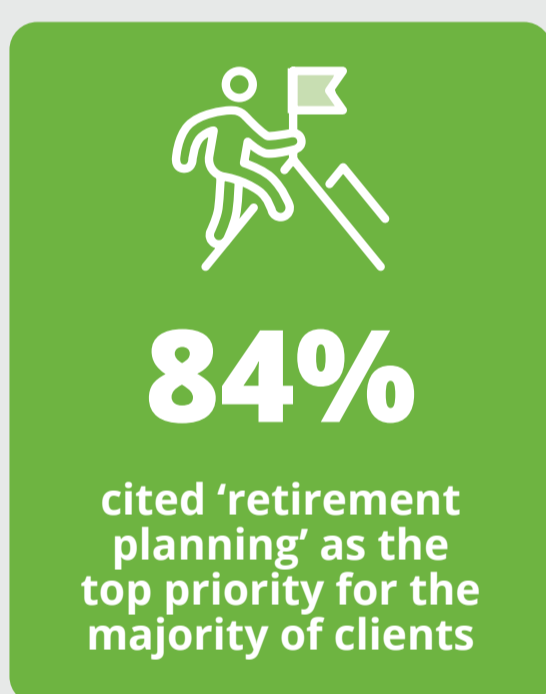
biggest obstacle to incorporating new tech into your practice:



# advisor insights



SURVEY | APRIL 2024 | 175 RESPONDENTS



## the key factors in decisions to add new tech:



51%

will it increase effectiveness of communication?



26%

is this product /service user friendly?



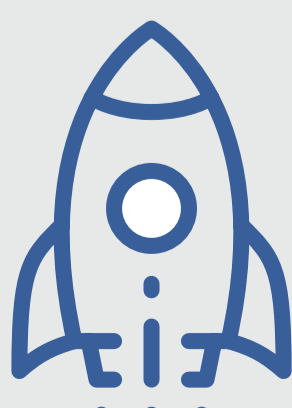
12%

will it optimize the number of clients I can meet?



11%

what is the cost of the product/service?



the majority of practices prioritize:

58%

organic growth

23%

next-gen wealth