Wealth Management by informa

WMIQ

The 2026 WealthStack Study

How Technology Is Driving the Growth of Wealth Management Firms and Re-Shaping the Industry

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Introduction and Highlights

Over the last five years Wealth Management has sought to better understand views on technology among wealth managers.

In this, our fifth edition of the survey, we are witnessing some fundamental changes in the technology landscape that are likely to reshape much of the business process management within advisory firms that traditionally have been performed either manually or with limited automation, most of it being driven and replaced by AI.

A picture is emerging of firms, especially among Innovator and Operator firms that are recognizing the far-reaching nature of AI technology, first through the widespread adoption of AI-driven notetakers and communications management platforms and applications (as well as other AI-driven point solutions), while others are being embedded deeply into all-in-one technology platforms. These tools are rapidly increasing efficiency in those firms employing it through not only day-to-day meeting preparation, communications and report generation but through automated workflow automation beyond the front office and into middle and back-office processes.

The consequences of agentic AI, which, in its simplest form simply refers to automated agents are even more far-reaching. Agentic wealth management platforms are already on the market that provide a foundation and intelligence layer that will allow transformation of technology stacks across the industry and could conceivably make the complaints about siloed data and broken integrations a thing of the past. Advisory firms are at the start of embracing these platforms, some only with pilots, others more aggressively while still others in the industry question safety of client data and the need for improved guardrails and regulation of AI vendors. Those discussions go beyond the scope of this year's report but massive change is afoot.

Wealth Management IQ (our research unit) has again surveyed advisors, c-suite executives, and others across the industry. Results from the survey demonstrate that most advisory firms continue their sharp focus on how best to leverage technology to not only better serve their clients but make maximum efficiency gains in their business both to grow assets under management and expand their client base.

The survey again asked firms to select from among three self-description categories, enabling results about technology usage, budgets, personnel, return on investment, and plans for the future to be presented for each self-defined group. This enables firms in each group to compare themselves to other groups as well as to all advisors in a way that indicates trends or patterns.

We came upon these three self-defined groups when analyzing the results of our first WealthStack Study in 2022. One group consists of firms that invest in technology to differentiate themselves in the market and provide the best possible customer experience. That group we label "Innovators." A second group invests in technology largely to improve operations and increase internal efficiency. Those are the "Operators." Finally, there were firms that said they did not prioritize technology or leverage it effectively. That group are the "Laggards."

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To track how priorities and goals have shifted among wealth managers over time we have again sought to keep the questions in the survey largely the same, having only added response choices where appropriate to gain additional or deepen insights.

One example of this is around artificial intelligence, where we sought to identify which types of AI-powered tools wealth managers are most, or least, engaging with.

The following are some of the highlights of this year's research:



1. Looking ahead, AI will define the competitive landscape. AI continues to be overwhelmingly viewed as the most impactful technology trend over the next five years (74%), far outpacing other innovations.



2. AI adoption has accelerated significantly. A strong majority (87%) of firms are now using or piloting AI tools, most commonly for meeting transcription, client communications, and workflow automation. However, usage is concentrated in assistive, low-risk applications, rather than transformational ones.



3. Agentic AI remains in its infancy. While 62% of survey respondents report some level of engagement with agentic AI, most are still in exploration or pilot phases, and only 16% have deployed agents in production environments. While this does highlight what appears to be a significant gap between interest and operational readiness, we expect that those firms that have adopted AI and seen significant gains in efficiency from it will only be more open to additional adoption as compliance, data privacy issues and guardrails and other constraints are addressed.



4. Innovator firms are employing more specialized technology. While overall adoption of dedicated estate planning and tax planning technology stands at 36% and 35% respectively when it comes to Innovator firms those percentages are significantly higher, at 44% and 49% respectively.



5. More firms plan to adopt new compliance technology. While new overall adoption remained largely the same year-over-year across categories of technology a significant difference emerged for compliance solutions, with a 9% increase among respondents reporting they would adopt new compliance technology in the coming year.

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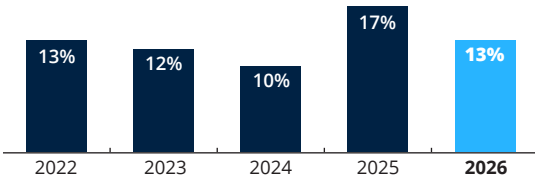
Emerging Challenges

Laggards No Longer Rising but The Great Technology Acceleration Could See Many Firms Left Behind

What appeared last year to possibly be the beginning of a growing trend in firms classifying themselves as Laggards, has dissipated with only 13% classifying themselves that way in this year's survey (down from 17% in 2025).

Firms Classifying Themselves as Laggards



Nonetheless, with some 87% of firms acknowledging that they are experimenting with some type of AI, and with 62% of firms now using agentic AI either in beta or a pilot form and with 16% of firms having at least a single agent in production usage the field is being set for increased adoption among technology-forward firms.

This could result in a growing gap between firms with AI experience and adoption and those conservative firms taking their time in using the technology. Perhaps it is simply accelerated evolution in action within a capitalist system, it is too soon to tell.

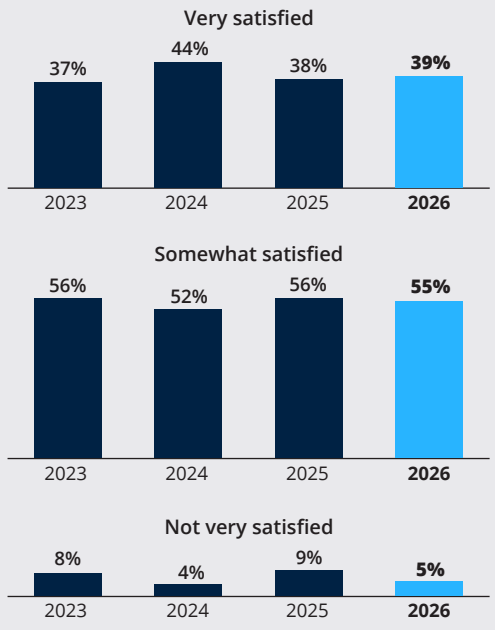
Overall, those very satisfied with their technology ROI rose ever so slightly by a percentage point in this year's survey, to 39% from 38% last year. This is certainly not a return to the heady days of 2024 when 44% of firms were very satisfied.

Meanwhile, a majority of advisory respondents remained somewhat satisfied with their technology this year at 55% but, again only a negligible change from 56% in 2025.

On the other hand, we saw a 4% drop in those who were not very satisfied to 5% this year.

What could be interesting is to see how next year's 2027 Innovator class views their satisfaction with ROI on their technology stacks. There was a slight rebound among Innovator firms in their view of ROI satisfaction up to 65% from 62% in 2025, which, again is still not as high as the 70% very satisfied among those firms in 2024. Could AI developments over the coming year boost those findings among tech-forward Innovator firms?

Overall Satisfaction with ROI from Current Technology Stack



There is farther to go among Operator firms, however, only 31% of them were very satisfied with their technology this year (32% in 2024). Among Laggard firms there was a 5% increase in their satisfaction to 17% who were very satisfied compared to only 12% in 2024.

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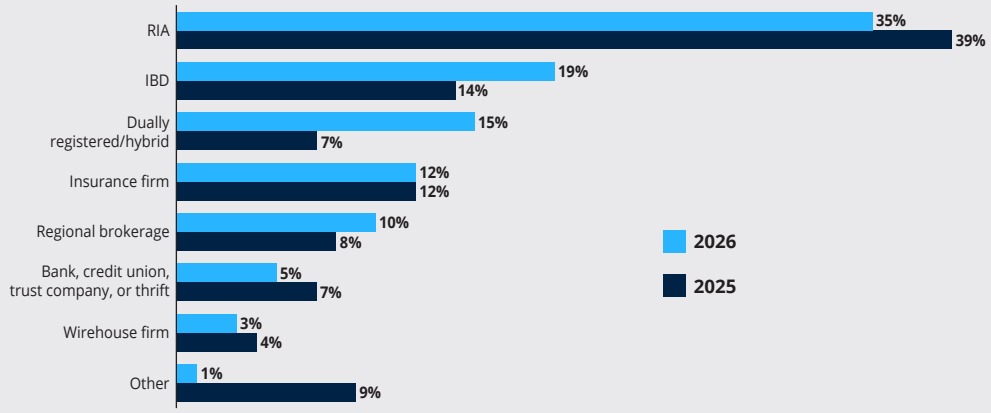
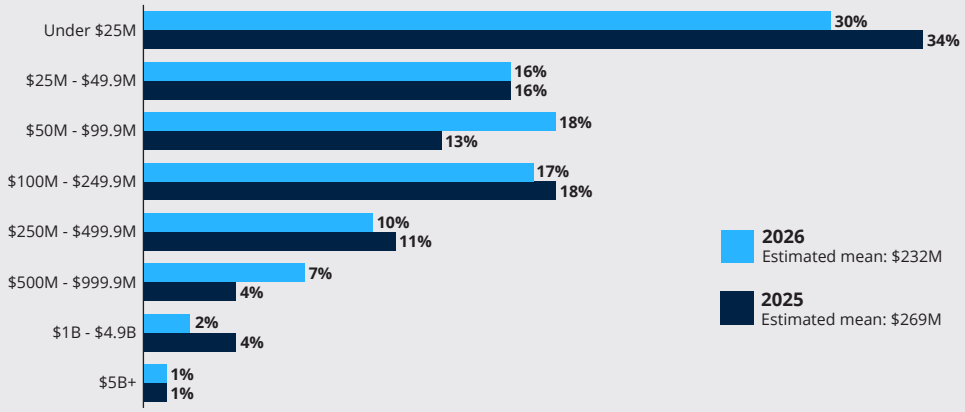
Respondents at a Glance

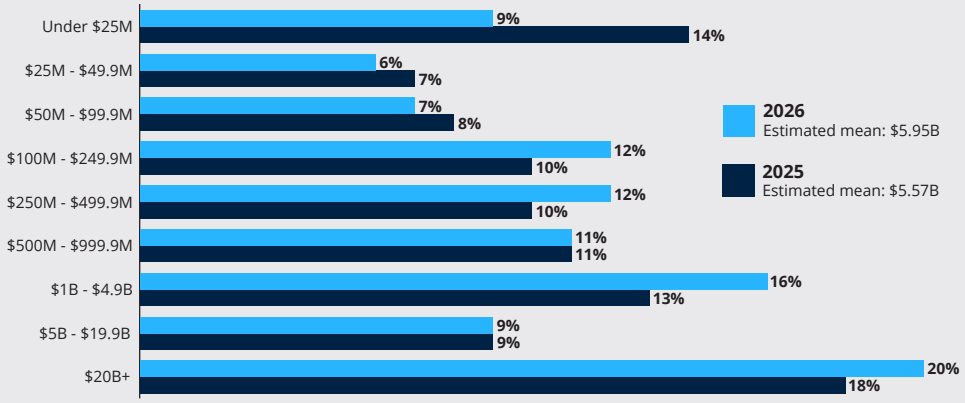
Firm Type



Total Assets Personally Managed



AUM Managed by Firm or Branch



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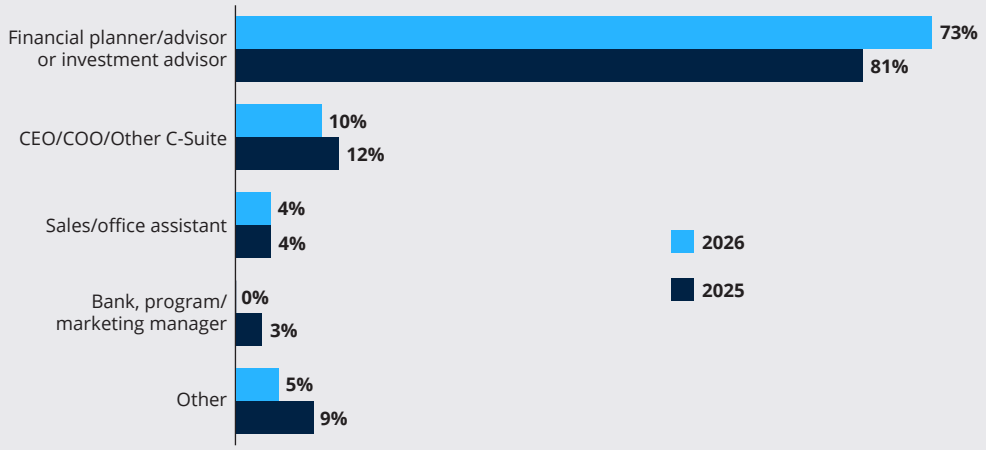
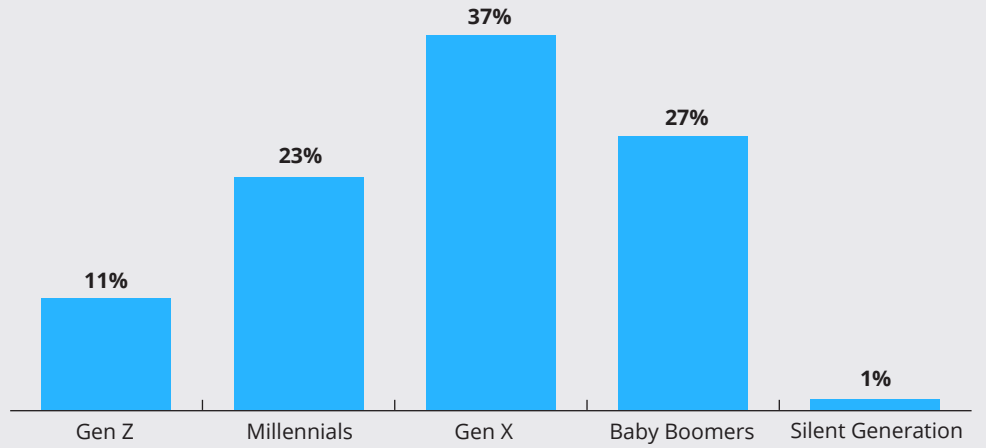
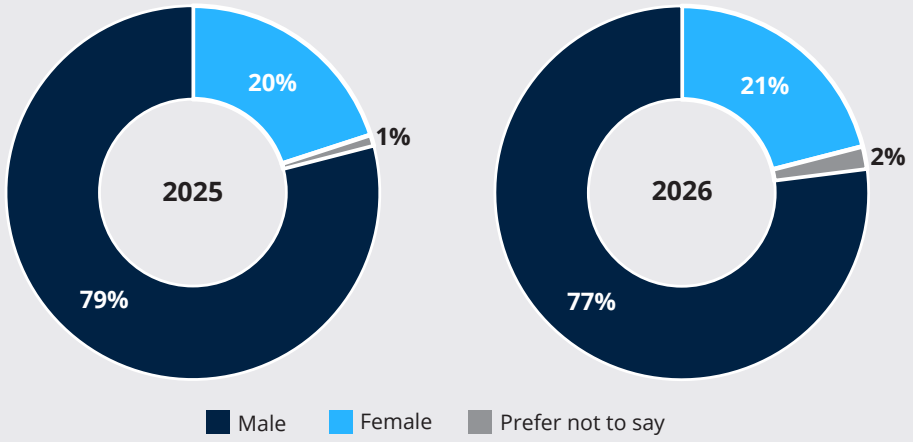
Primary Role



Respondent Age



Respondent Gender



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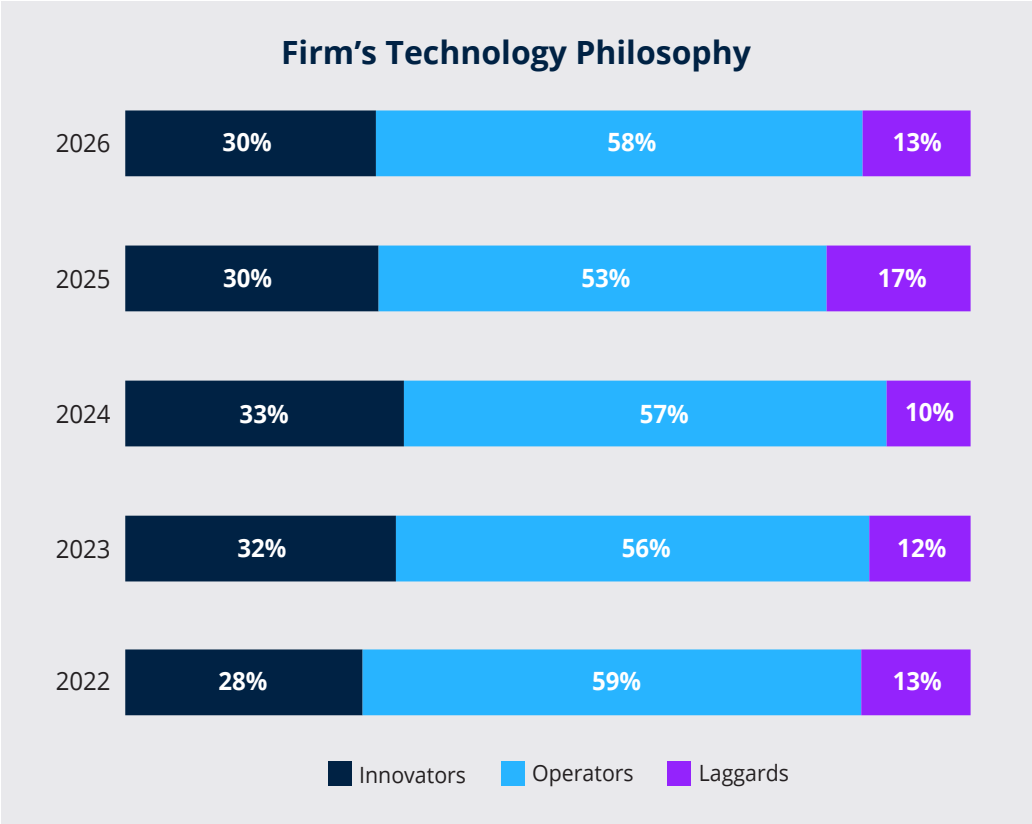
Philosophy, Goals and Objectives

For the fifth year roughly one-third of advisory firms in our survey have self-identified as Innovators.

The majority of firms, however, consider themselves Operators at 58%.

Last year's increase in Laggards (to 17% from 10% in 2024), declined back to similar levels as previous surveys at 13% for this year's study.



Over the course of all five surveys, the quest for new clients has topped the list of business priorities among respondents, though it dropped by six percentage points from 63% last year to 57% in 2026.

While the top three selections (out of nine total) have always included the same three top choices, the order for two and three reversed in this year's survey.

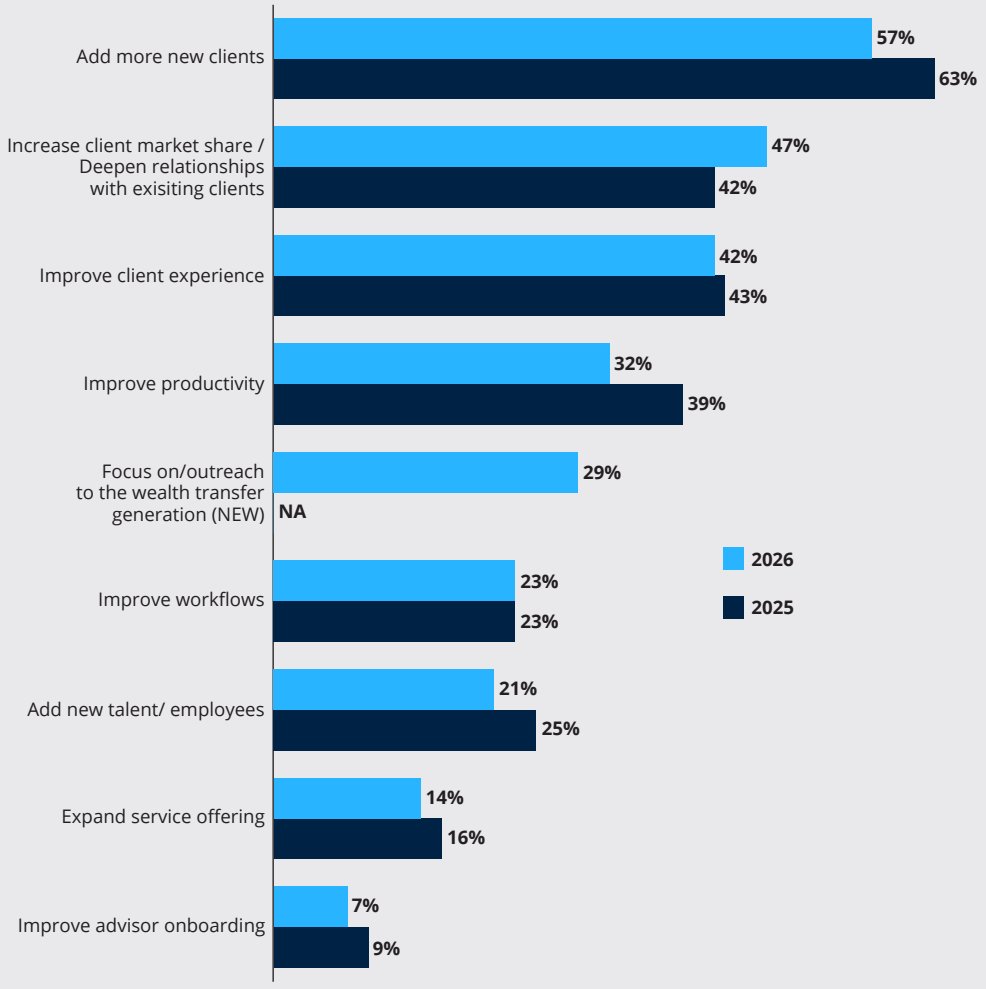
At number two this year was "increasing client wallet share and deepening relationships with existing clients" (which we combined this year into a single objective to avoid confusion). It was selected by 47% of respondents, followed in the number three position this year by "improving client experience" (42%).

This order of objectives proved largely consistent across the three business categories with Innovator firms, Operators, and Laggards all choosing the addition of new clients as their top objective followed by increased client wallet share. Among Innovator firms and Operators “improved client experience” came in as the third most selected objective, while among Laggards “improved productivity” was the third priority (as it was the year before).

Among the nine objectives this year was a new entry: “focus on/outreach to the wealth transfer generation”. This objective came in at number five, selected by 29% of respondents. Given the amount of focus and attention the impending great wealth transfer receives in the media and at industry conferences we would expect this objective to climb in the years ahead.

The remaining business objectives followed in the same order and at close to the same percentages year-over-year this year as they did between 2024 and 2025.

Top Three Business Objectives, Next Year



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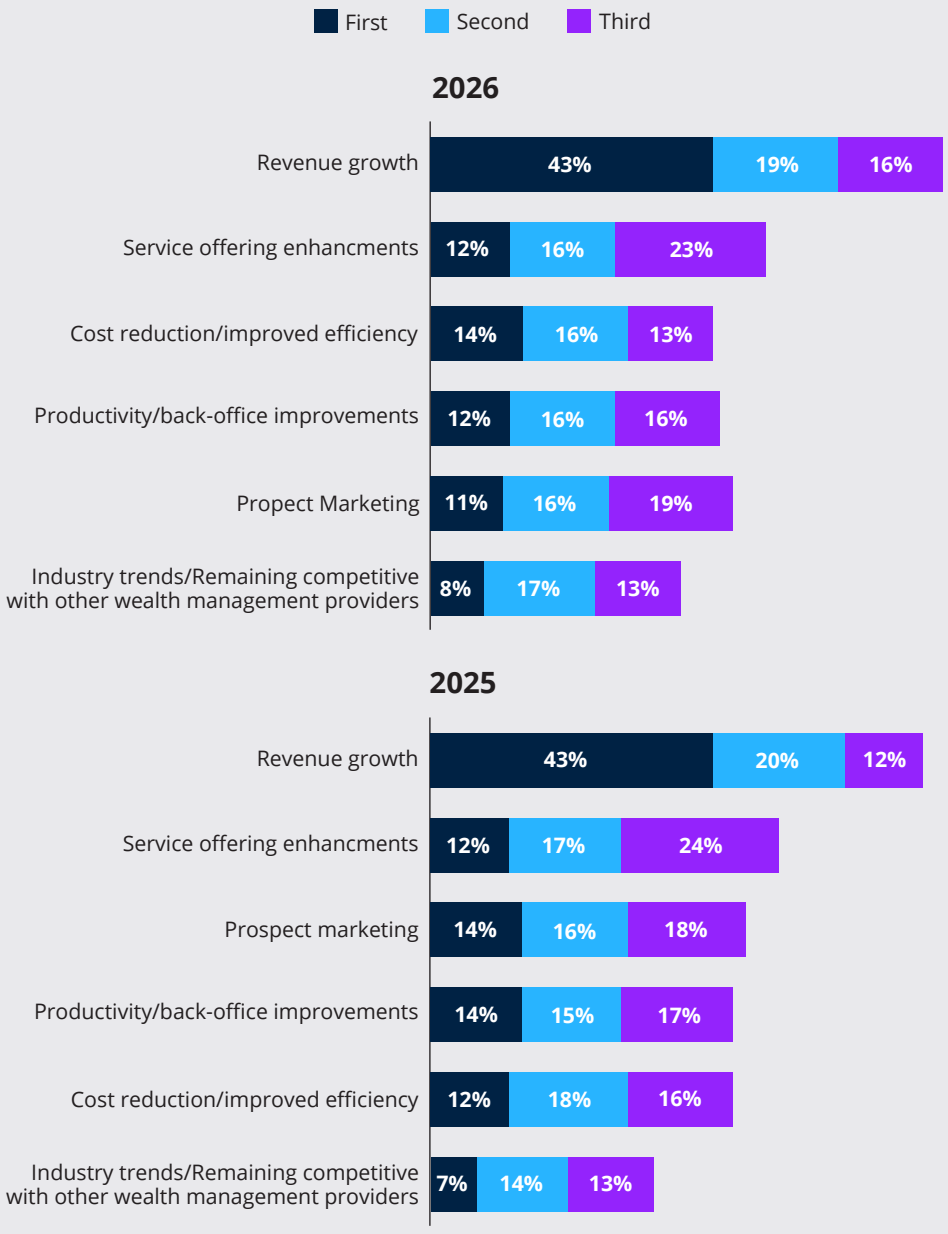
As firm's rank what is most needed to support business objectives, the top-ranking consideration for three years by a wide margin has remained "technologies that support revenue growth" (43% of respondents selected this as their top-ranked choice both this year and in 2025, with 40% in 2024).

This was followed distantly, as it was in 2025, by "service offering enhancements" as the second ranked consideration in evaluating technology needs.

The third choice changed, however, with respondents selecting cost reduction/improved efficiency over their 2025 choice of prospect marketing.

Ranked Considerations in Evaluating Technology Needs



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Technology Use, Perceptions and Grading

No matter which of the three categories a firm claims to be part of, those in each of the categories thought a bit more positively about how they graded themselves when it came to their technology usage in 2026 over that of 2025. A full 86% of Innovator firms gave themselves a grade of "A", or "B" in 2026, compared to only 81% who did so in 2025. This meant that the firms felt they both embraced technology and maximized their technology investments and were committed to technology and thought of themselves as effective users of it.

Operator firms graded themselves an "A" or "B" 45% of the time this year, a mere percentage point beyond the 44% in 2025.

Laggards in 2026, however, gave themselves an 8% boost in those giving themselves an "A" or "B" grade: 13% this year as compared to only 5% in 2025.

While overall, slightly more than a third (35%, up a percentage point from 34% in 2025) of firms gave themselves a "C" in overall technology use (meaning that while they felt they adequately invested in technology, they were not leveraging it to its fullest potential). We saw a decline overall in those firms giving themselves a "D" grade to 10% (from 14% in 2025); these are firms that felt they were not adequately investing in, nor leveraging their technology platform to its fullest potential) or "F" (down to 2% from 3% in 2025), which are those selecting that they "do not have adequate technology available" at their firm).

Technology and growth

The perceived importance of technology in a firm's ability to grow over the next five years bounced back in 2026 to levels close to what the survey revealed in 2024 among Innovator firms. This year, 87% of Innovator firm respondents deemed technology either critical or very important for growth, compared to 81% in 2025 and 89% in 2024.

Among Operators the percentages were closer with 68% feeling that technology was either critical or very important for growth this year compared to 72% in 2025 and 71% in 2024. Similarly Laggard firms thinking of technology as very important to critical dropped by 4% to 52% this year. It is worth noting that this is a 17% drop from 2024 when 69% of Laggards saw technology as very important to critical for growth.

A shift in technology-related challenges

The ubiquitous presence of AI and the overall acceleration of technology development were well reflected in this year's survey results. We believe its effects on wealth managers can be seen in a shift among the top perceived challenges from 2025 to 2026. The survey choice of "keeping on top of tech changes/managing the tech stack" rose to the top, most selected challenge this year ("user training and adoption" was the top challenge in 2025). Some 76% of respondents found "keeping on top of tech changes" either extremely (31%) or somewhat (44%) challenging.

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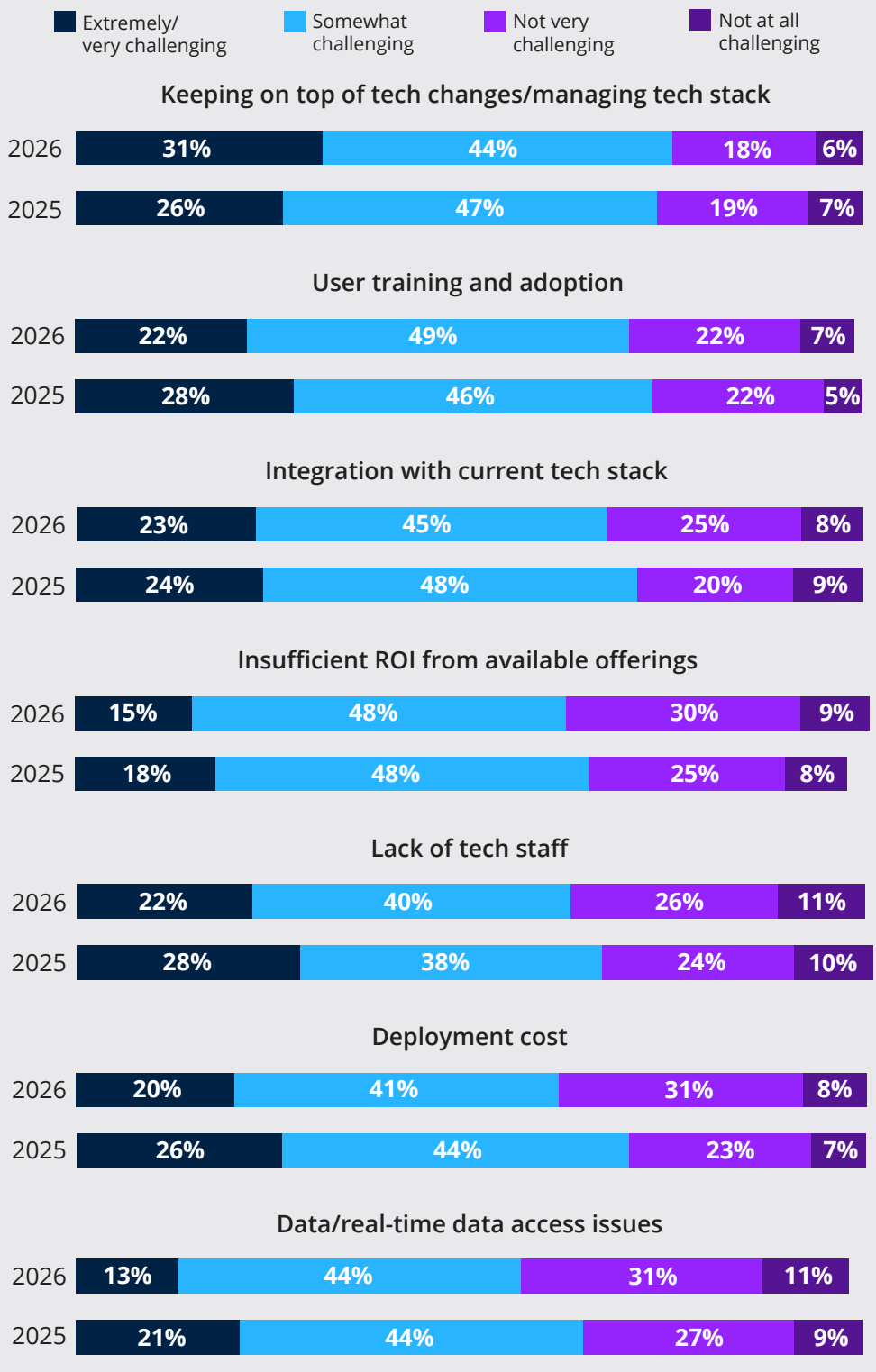
"User training and adoption," the top challenge of 2025, fell to second place (71% overall), followed by "integration with current tech stack" (67%) and "lack of tech staff" (63%).

Ranked Considerations in Evaluating Technology Needs



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Most Utilized Technology

It will come as no surprise that again in this year's study 73% of firms reported using financial planning technology (see chart page 15), the area most supported by technology, followed again by portfolio management at 71%, (a three percentage point rise over last year), and in third place compliance, which also saw an increase of three percent at 54%.

While firms could select as many technology areas on a list of 11 choices as they used only those three areas, financial planning, portfolio management and compliance were used by a majority of advisory firms.

The marketing conundrum

Surprisingly, marketing technology did not make that cut in this year's survey, which fell to 45%, down from 51% in 2025 (see chart on page 14).

While most firms have moved beyond referral-only growth, and 73% report running some form of structured marketing campaigns, those approaches remain fragmented—primarily relying on general-purpose tools or partial platform combinations—while fully integrated technology or outsourced solutions are less common.

At 20%, non-wealth-management-specific general-purpose marketing tools, including email marketing and social scheduling were the most popular form of marketing tools selected by respondents, followed at only 18% by combination use, which included usage of bundled platform marketing and standalone marketing efforts. Marketing capabilities bundled inside a broader advisory platform was the next most common toolset used by firm respondents at 15%.

For whatever reason, whether expense, complexity, or for other reasons, only 6% of respondents reported using third-party dedicated standalone marketing platforms, while another 6% reported relying on an agency or consultant for their marketing.

Perhaps most surprisingly for an industry constantly touting its ongoing search for new clients, 7% of respondents reported no dedicated marketing technology whatsoever and 27% reported not conducting marketing campaigns at all beyond seeking basic referrals and networking efforts.

Minor gains and declines in other technology areas, with an Innovator caveat

New to the 2026 study was the area of "digital workflow automation", which garnered a strong 41% usage among respondents, in this, its inaugural inclusion (see chart page 15). While the ability to create workflow processes and bring to them some level of automation has been present in many CRM systems for years, it has seen limited adoption among many firms, often due to inherent setup complexity. Dedicated third-party workflow automation products such as Hubly, which was recently acquired by Docupace, have grown in popularity among some tech-forward firms, as has the embedding of workflow automation in various artificial intelligence platforms. While it was too early to attempt separating out this type of AI workflow automation support for this year's study, we plan to do so in 2027.

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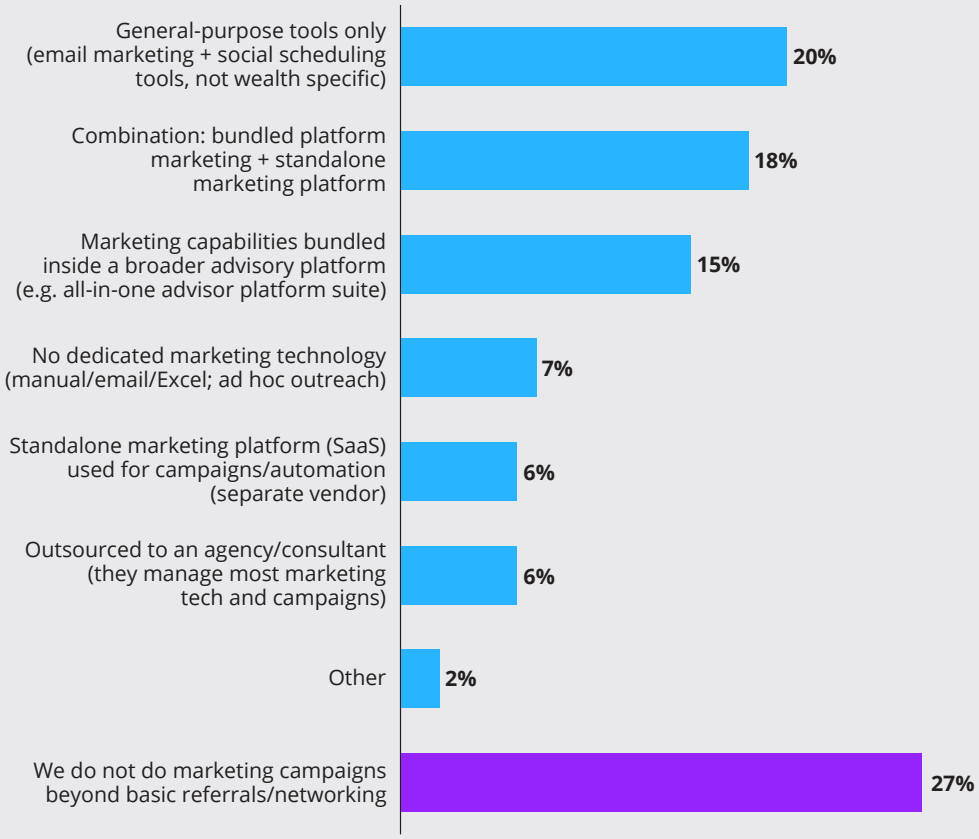
It was perplexing to find no evidence of overall growth in usage of estate planning among respondent firms in our study. Those claiming to use estate planning technology remained flat year-over-year at 36%. However, we did find that 44% of Innovator firms were employing estate planning (35% of Operator firms and 23% of Laggard firms reported using estate planning). Indeed, Innovator firms are employing specialized tools at much higher rates than their Operator and Laggard contemporaries.

For example, while the overall percentage of firms using tax planning technology is 35%, among Innovator firms 49% are using the technology (this falls to 31% and 28% respectively among Operator and Laggard firms). Similarly, business intelligence technology is employed by 41% of Innovator firms but 24% and 23% respectively among Operator and Laggard firms.

And finally, when it comes to direct indexing/personalized indexing and tax optimization technology (which includes systemic tax-loss harvesting) the survey found that 29% of Innovator firms employ the technology, whereas only 23% of Operator firms use it and a mere 6% of Laggard firms.

Taken together it would appear that either clients are seeking out these new services or that Innovator firms view adoption of these newer and more specialized technologies as providing them competitive advantage.

Marketing Technology & Campaign Management Approaches



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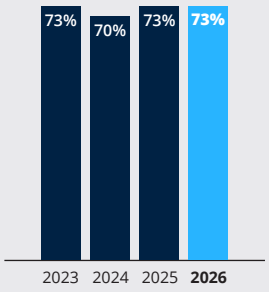
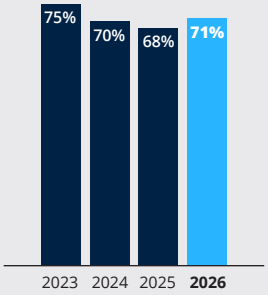
Business Areas Supported Using Technology Tools

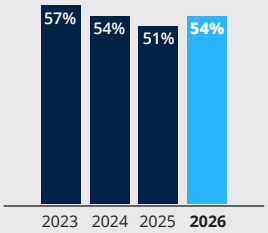
Financial planning



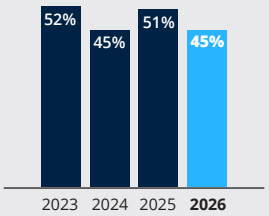
Portfolio management



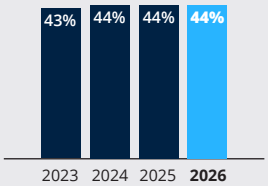
Compliance



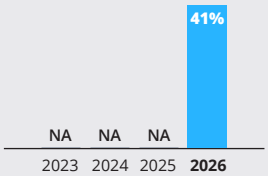
Marketing



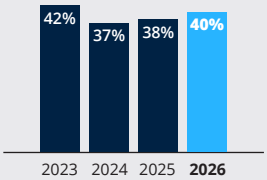
Risk management



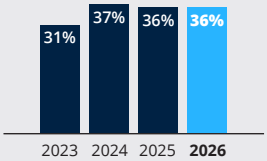
Digital workflow automation*



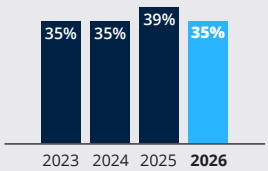
Client attraction and retention



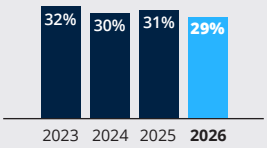
Estate planning



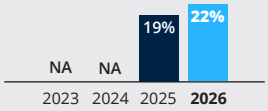
Tax planning



Business intelligence



Direct indexing/ personalized indexing and tax



*Denotes new response option in 2026.

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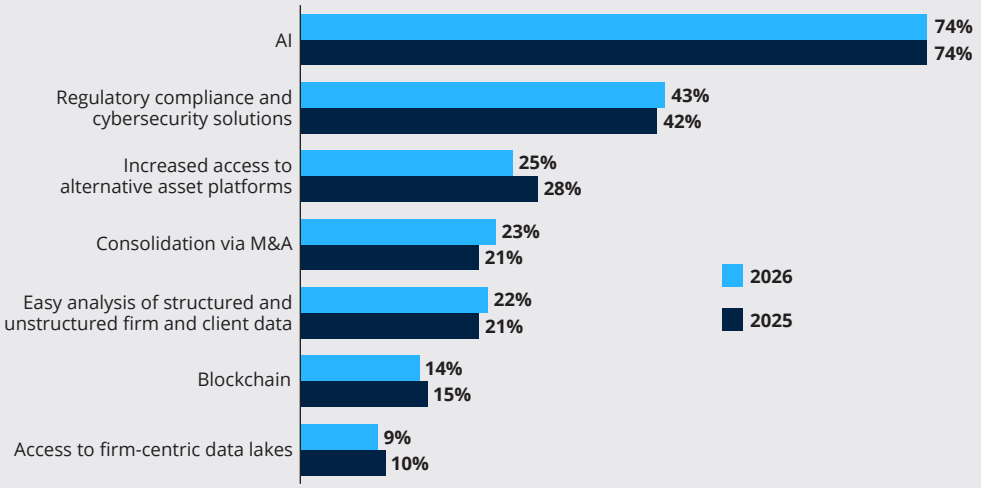
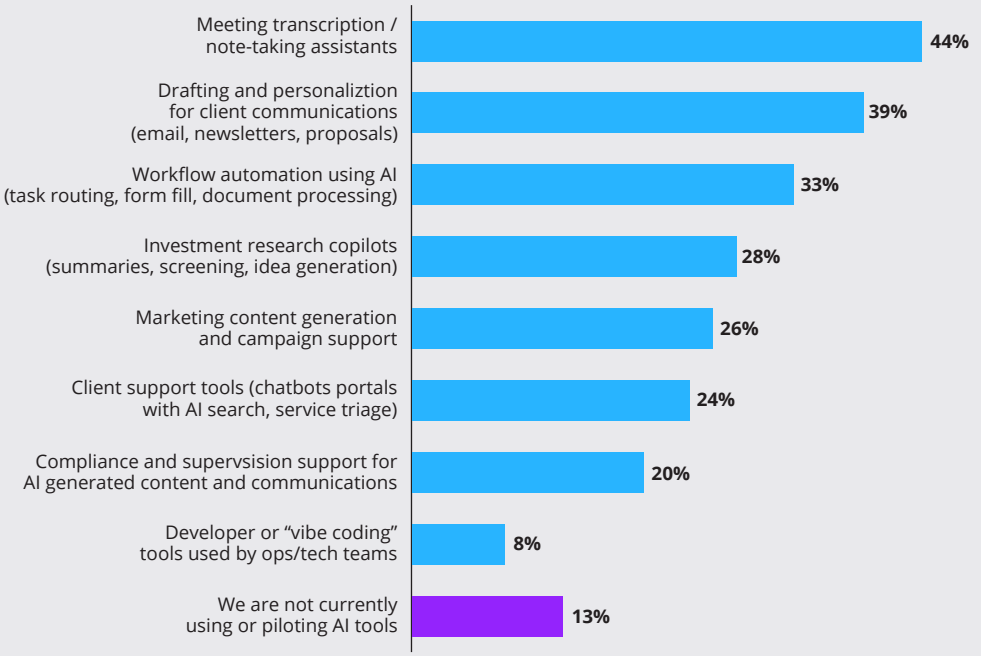
Developments in Artificial Intelligence Usage

When asked what technology trends will have the biggest impact on the wealth management industry in the next five years respondents again chose artificial intelligence as they had in 2025 as their top choice. In both years 74% found AI's impact would far outstrip any other technology trend in its impact.

Most Impactful Technology Trends, Next 5 Years



AI Tools Gain Traction Across Wealth Firms



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In this year's study 87% of respondents reported that they are using and/or piloting AI-powered tools in 2026, which is a significant increase from 2025 when we found that only 68% were doing so, just shy of a 20% increase.

With this year's study we also increased the types of AI tools we sought usage on as can be seen in the accompanying chart on those tools gaining traction (see second chart page 16).

Meanwhile, those respondents stating that they were not currently using or piloting AI tools dropped to 13% from 32% in 2025.

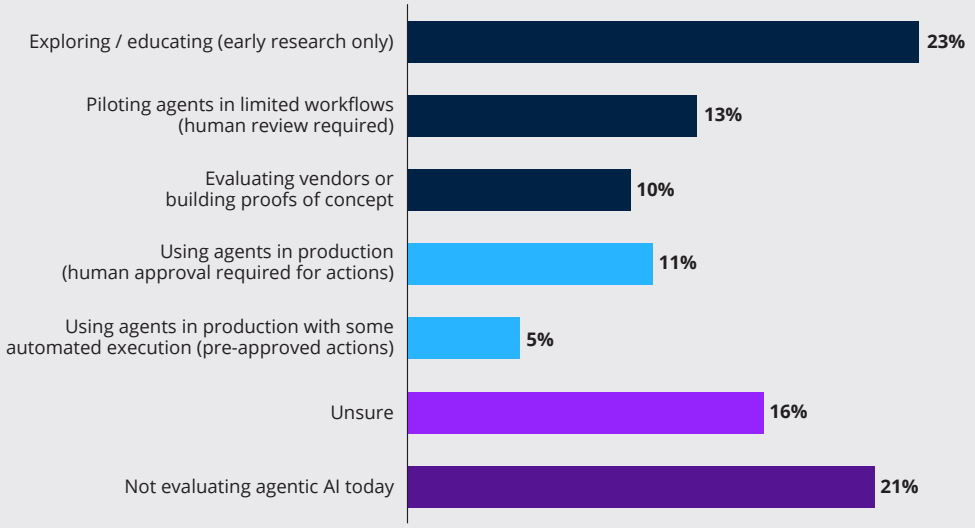
Far behind AI on our chart of impactful technology trends in second place at 43% (almost unchanged from 2025's 42%) was regulatory compliance and cybersecurity solutions. It can easily be argued that this choice was influenced by developments in AI as well. Given the current administration's largely laissez faire attitude toward regulation of most industries, advisors are looking to the many advancements in AI both as a possible force multiplier when it comes to compliance and a reduction in manual processes and an increase in workflow automation.

When it comes to cybersecurity, AI is seen across many industries as a double-edged sword. Among cybersecurity professionals whose job is to protect companies from both external and internal forms of threats and theft, AI is seen as a means of efficiently searching for and repairing or filling vulnerabilities in technology.

Among threat actors AI is also seen as a force multiplier, providing smaller teams of hackers and bad actors with exponentially greater ability to launch exponentially more attacks and also search for vulnerabilities in targeted company networks. An accelerating arms race continues between bad actors and the cybersecurity protection industry. For those of us following this war the good guys remain underfunded and the bad guys ever more able to leverage AI cheaply for their own use.

Advisory firms must prioritize spending more on cyber-related protection of their firms.

Firms are Engaged with Agentic AI, But Few Are in Production



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Delivering Value

Which technology solutions really deliver value? Those seen as providing the best return on investment (ROI) have remained consistent over time and this year's list was in the same order as 2025, at the top was financial planning (54%), portfolio management (46%), customer relationship management (42%), and client communication tools (34%). Financial planning saw a 4% increase over 2025 while the latter three were all within a percentage point of 2025's findings.

There was very little change among the other seven categories of technology solutions with the exception of a 6% increase in digital workflow automation, which is not surprising given the increase in AI-driven products that have rapidly come to market.

Technology Solutions Delivering the Best ROI: Segment Detail

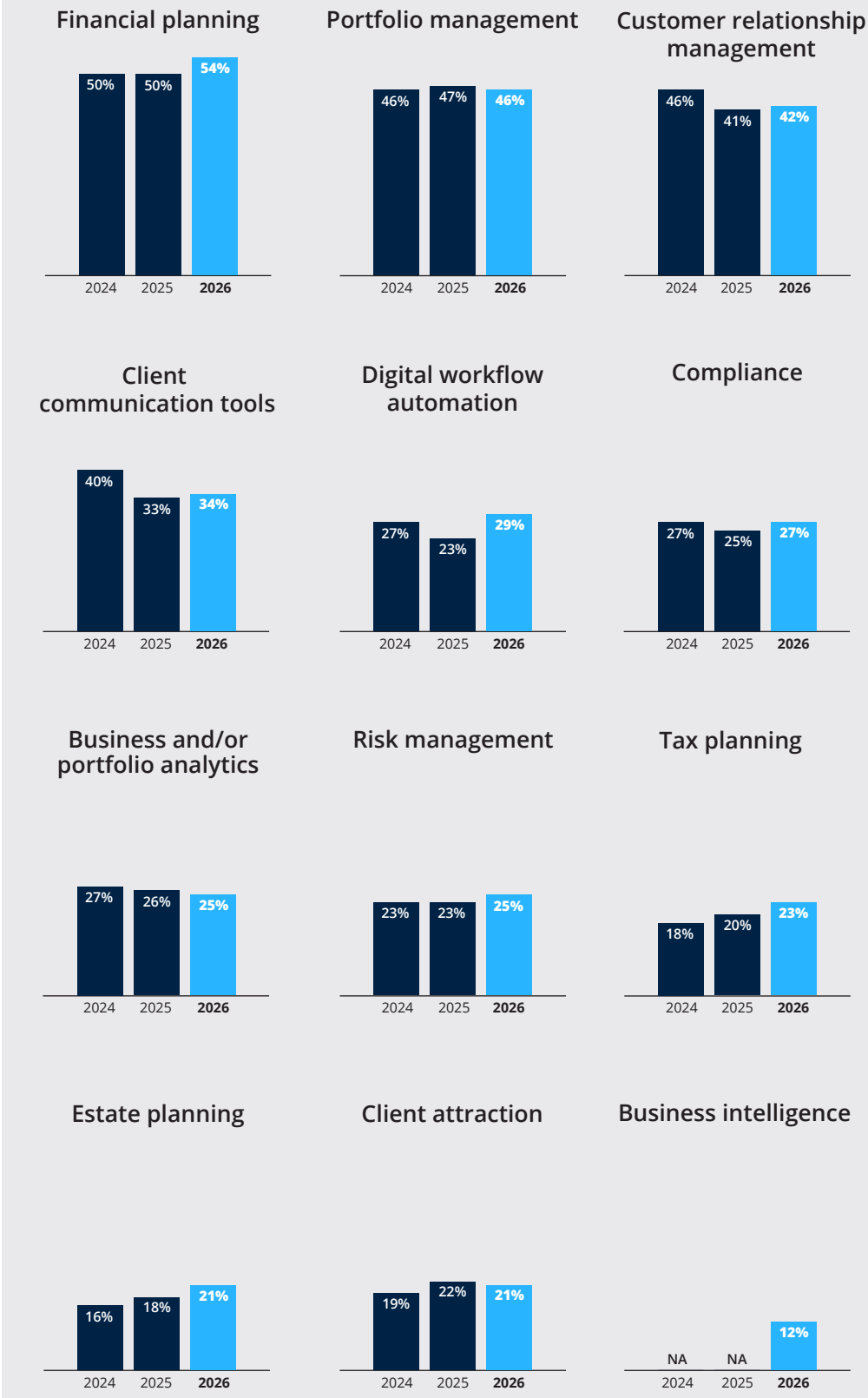
2026: Top Three

Innovators	%
Financial planning	59%
Client communication tools	49%
Portfolio management	48%
Operators	**%**
Financial planning	54%
Portfolio management	48%
Client communication tools	45%
Laggards	**%**
Portfolio management	45%
Financial planning	32%
Customer relationship management | Business and/or portfolio analytics | Risk management [TIE]	28%

2025: Top Three

Innovators	%
Financial planning	55%
Customer relationship management	49%
Portfolio management	46%
Operators	**%**
Financial planning	51%
Portfolio management	48%
Customer relationship management	45%
Laggards	**%**
Customer relationship management	51%
Portfolio management	48%
Digital workflow automation	45%

Technology Solutions Delivering the Best ROI



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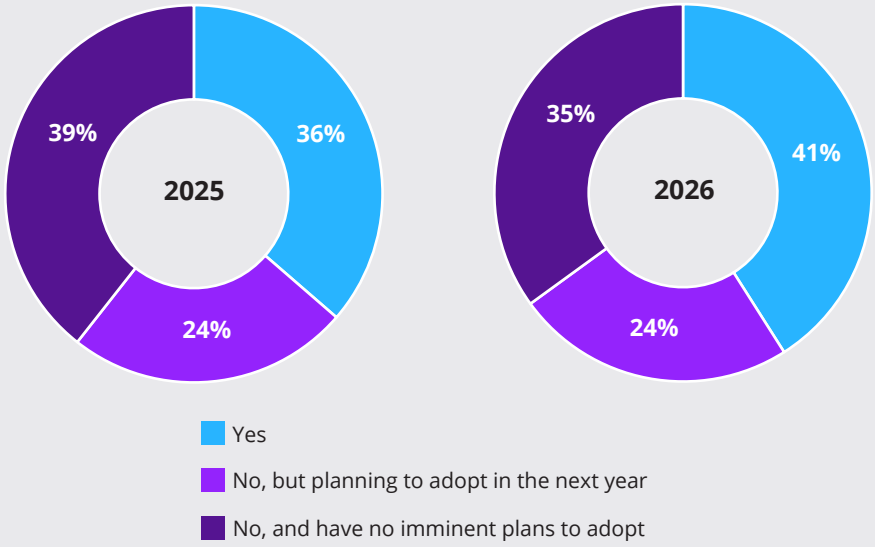
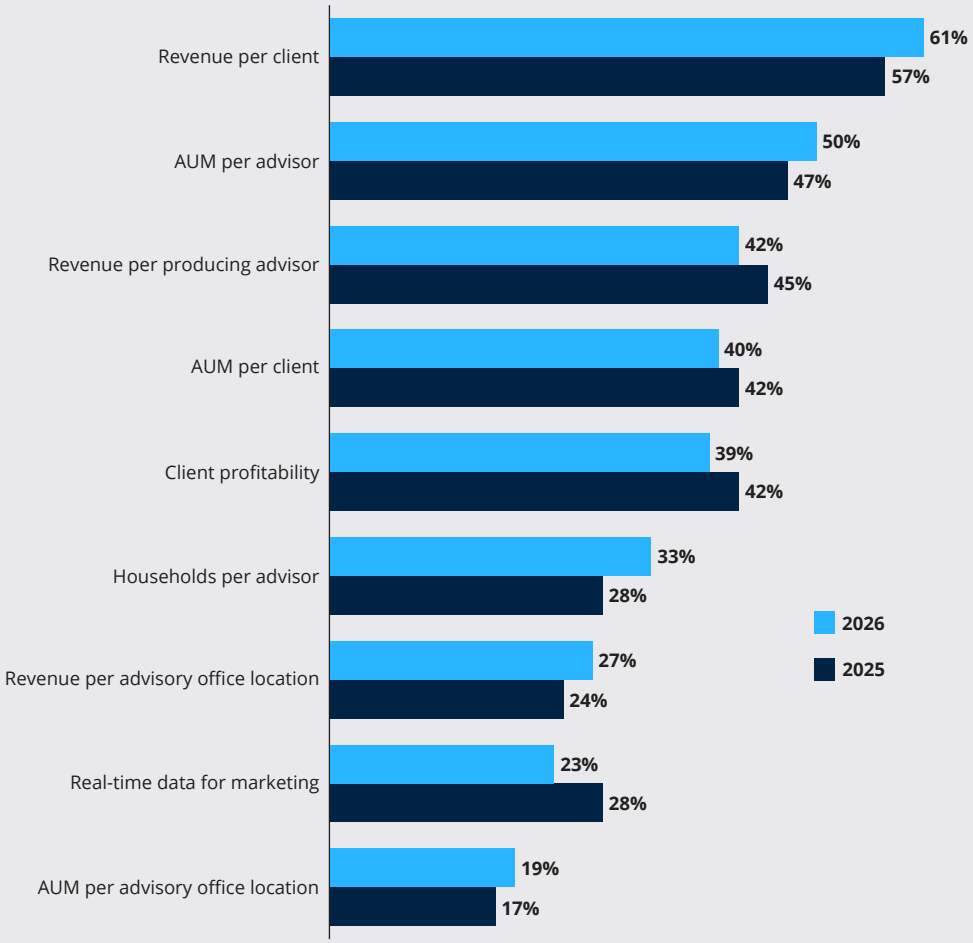
Firm Use of Business Intelligence Technology



Most Useful BI Software Metrics



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Expectations on Technology Spending, New Adoption, and Staffing

This year's study found (as have all five studies since 2022) that again almost no firms expect their technology budgets to decrease, and only a minority, 16% this year expect their budgets to increase substantially (compared to 15% in 2025, and 14% in 2024). A majority of respondents at 57% this year, responded that they anticipated a slight increase in technology spending (58% in 2025), whereas only 21% anticipated no change in tech spending this year versus 20% in 2025.

A majority of respondents, 59%, anticipate spending somewhere between 5% and 14% of their revenue on technology in the coming year. Very few firms plan to spend less than 5% of revenue (only 11% this year and last) on technology, and only 30% estimate they will spend over 15% of revenue on technology.

And looking at these estimates broken down by firm category type showed little difference as well: the mean for Innovator firms is estimated at 14% of revenue, Operator firms 12% and Laggards 9% (very close to the same percentages for 2025).

New technology additions

The vast majority of 2026 respondents (91%), plan to adopt new technology in the next year (88% last year) and a mere 12% have no plans to adopt new technology. The top three planned additions among respondents remained the same as last year: client attraction (prospecting and lead generation tools), digital workflow automation, and cybersecurity. Just under a third of respondents planned to add these three types of technology.

There were only slight variations year-over-year regarding adoption of new core advisory technology, including portfolio management, financial planning, client communications tools, business and portfolio analytics and risk management, 20% to 25% of respondents planned on acquiring each of these this year.

The one exception to this was in the category of compliance where there was a 9% increase among firms planning to adopt new compliance technology, meaning 22% of firms planned to acquire it this year versus only 13% last year. One possible explanation for this is the growing market of new AI-powered tools that could dramatically simplify and automate much of the formerly manual review and analysis of written or video content.

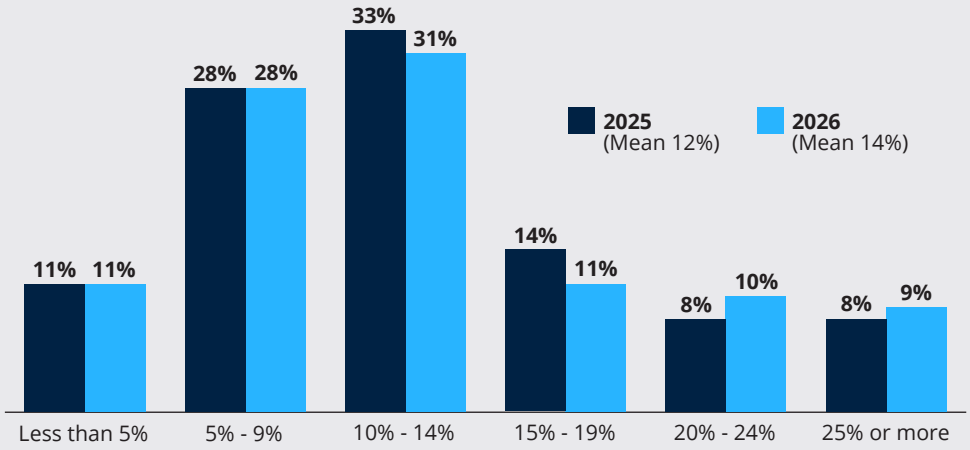
Technology and support staffing

Again, this year a majority, 54% of respondents, reported that they expected their tech support staff headcount to remain flat in the coming year, while roughly a quarter reported they expected their tech support staff would increase.

As with the 2025 study, 38% of respondents said they do not employ any dedicated technology support staff.

While 62% of firms report that they employ or maintain some type of dedicated technology support staff, those types run the gamut. Only 25% of respondents employe full-time in-house technology staff. From there though, some employee third-party or outsourced full-time tech staff (11%), part-time in-house (6%), or part-time third-party tech staff (10%).

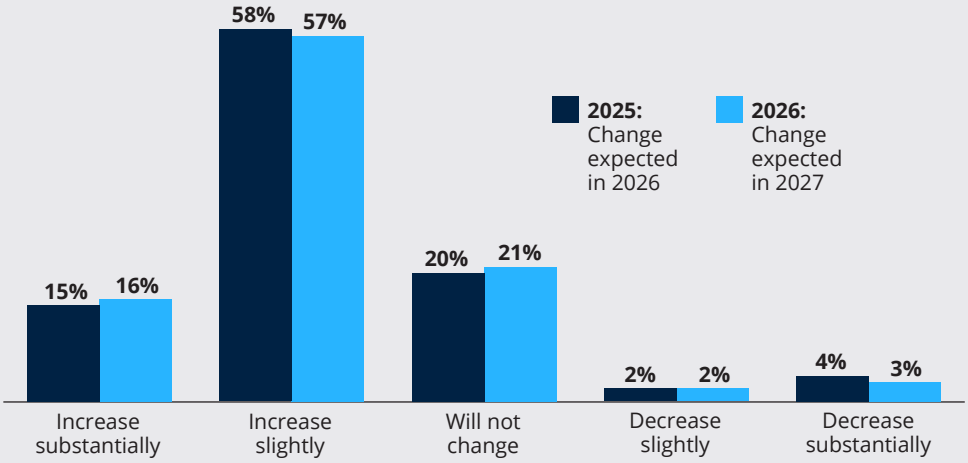
Percent of Revenue Firm Will Spend on Technology



2025	Mean
Innovators	13%
Operators	11%
Laggards	9%

2026	Mean
Innovators	14%
Operators	12%
Laggards	9%

Change in Firm's Technology Budget in Coming Year



2025: 2026 Change	NET Increase
Innovators	80%
Operators	74%
Laggards	52%

2026: 2027 Change	NET Increase
Innovators	80%
Operators	74%
Laggards	54%

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Lessons of the Innovators

The one-third of firms that invest in technology to differentiate themselves and provide the best possible client experience — firms we have labeled "Innovators" — tend to be early adopters of new technology and are unafraid to experiment. They are also not afraid to assess what is working well and weigh the possibilities of replacing what is not performing to their or their client's expectations.

The following are some lessons that may be gleaned from the experiences of Innovators:

Most innovator firms have employed AI-powered meeting and note-taking communications applications for at least a year now. Some have used them for longer or have already tried multiple offerings from providers like Jump or Zocks among many others. Many of the most popular of these applications have gained widespread media attention and have raised significant funding. Many of them also have free trials. Firms large and small have begun to see large efficiency gains and time-savings from use of this technology. Over the course of 2025 and into 2026 we have seen artificial intelligence point solutions arrive in other areas from prospecting and lead generation (from WealthTech startups like FINNY, Aidentified, Catchlight and others). Other increasingly popular use cases with a growing number of providers are AI tools for investment research, portfolio management and analysis including automated agents. And it is with agentic AI where Innovator firms are beginning to use automated agents or initiate pilots of agentic platforms. While there remains controversy over how best to build out guardrails, ensure compliance, and protect the private information of clients and firms, Innovator firms are pioneering how this will best work for the rest of the industry. Those firms taking a complete wait and see attitude are likely to be left behind as efficiency gains among Innovator firms allow them to outpace others in productivity and, likely, growth.

Process-improvement and automation is the gift that keeps on giving. Many innovator firms not only embrace their technology but dive deeply into how to get the most from it. Technology in general has greatly enhanced efficiency by reducing costs, time, and errors in firm operations over the years. With the advent and introduction of AI and especially agentic AI into core firm processes the ways firms have traditionally operated are going to see fundamental changes both in the level of manual human processing of work but potentially how much staff a firm must employ, especially from an administrative perspective. With agentic AI these processes are being accelerated and are likely to be more fundamentally all-encompassing for the firm and how it operates over the next year as adoption increases.

Reaping the rewards of technology requires a commitment of resources.

Over the five years of this study, we have noted that Innovators tend to be more willing to invest in technology on an on-going basis than other firms. They also invest in people who understand technology and can support firmwide efforts.

Research Methodology

Methodology, data collection and analysis by Wealth Management's WMIQ, in partnership with SS&C and Docupace. Data collected April 8 - 27, 2026. Methodology conforms to accepted marketing research methods, practices and procedures

Beginning on April 8, 2026, WealthManagement.com emailed invitations to participate in an online survey to active users. By April 27, 2026, Wealth Management had received 377 completed responses.

Comparative data was collected March 12 – 24, 2025, yielding 414 completed responses.

To encourage prompt response and increase the response rate overall, email invitations and survey materials were branded with the WealthManagement.com name and logo to capitalize on user affinity for this valued brand.

The first 200 respondents were afforded the opportunity to receive a $10 Starbucks gift card as a token of appreciation for their participation in the survey. The following are some lessons that may be gleaned from the experiences of Innovators:

About SS&C Black Diamond

SS&C Black Diamond Wealth Solutions is a suite of technology and services that streamlines operations, strengthens client connections, and supports long-term growth for wealth management firms.

By centralizing key business functions—from portfolio management to client engagement— Black Diamond streamlines workflows and simplifies operations. It's backed by flexible integrations and a dedicated support team, all from a single, trusted provider.

For more information, please visit: www.sscblackdiamond.com

About Docupace

Docupace is a solutions provider focused on digitizing and automating operations in the financial advice and investment industry. Financial services firms use the Docupace Platform (a cloud-based, integrated software suite) to reduce back-office expenses, improve efficiency, strengthen recruiting, and enhance the experience of advisors and investors. With headquarters in Holmdel, New Jersey, Docupace is proud to serve some of the largest independent broker-dealers and registered investment advisers (RIAs) in the financial services industry.

For more information, please visit: www.docupace.comFor more information, please visit: www.sscblackdiamond.com.

About WMIQ

Wealth Management IQ is a dedicated division of Informa Connect that provides research, content creation and marketing services to the wealth and asset management communities.

WMIQ has a truly unique combination of:

- Deep research and analytical capabilities
- Extensive knowledge of the financial advice industry
- Content strategy and direct distribution to over 400K wealth management professionals

Our mission is to educate and inform financial advisors with our research content — and provide the companies that support and empower them with unparalleled access, intelligence and understanding of the wealth management market.

Through the audiences of Wealth Management, Trust & Estates and WMRE, WMIQ has the ability to tap into some of the most influential communities of financial advisors to conduct targeted surveys, focus groups and one-to-one interviews to inform our research projects. Our audiences of RIAs, IBDs and wirehouse advisors — and their affinity for our brands — positions WMIQ to access more engaged advisors than any other industry research provider. This reach across the entire wealth management ecosystem is a unique differentiator of WMIQ — and allows us to discover the true drivers of change, behaviors and influence throughout the industry.