

Paula de Vos of Synergist Wealth Advisors LLC on Disruptive Trends in Wealth Management

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[San Francisco](#), CA – Wealth management is undoubtedly a key sector in the financial services industry. The sector is undergoing considerable changes as new disruptive trends are taking shape: digital transformation and customer experience.

[According to Paula de Vos of Synergist Wealth Advisors LLC](#), players in the sector need to keep up with the rapid market innovation and client demands. Thus, it is vital to embrace new technological solutions to enhance the quality of services.

The emergence of robotic-advisors and electronic platforms is a key factor in reshaping the core operating model of countless firms. Paula de Vos emphasizes the need for service providers to reinvent services by providing

greater personalization.

Paula told the Journal of Financial Planning that planners maximize value for clients by maintaining high levels of objectivity. She added that planners' objectivity helped clients counteract instinctive behaviors, which can undermine investment portfolios' performance.

As an experienced wealth management advisor, Paula sees the considerable benefits of educating clients about behavioral finance. She believes that doing so leaves clients open to making the necessary adjustments to ensure success.

Her comments, which were inspired by Nobel Prize-winning psychologist Daniel Kahneman were quoted in the book 'The History of Financial Planning: The Transformation of Financial Services.'

These are the key disruptive trends that were identified by Paula de Vos.

AI-powered analytics and big data

As big data revolutionizes both small and large companies in wide-ranging industries, professionals at [Synergist Wealth Advisors LLC](#) see increased investment by wealth management firms in advanced analytics. Firms are also taking advantage of cutting-edge management systems.

These systems make it easier to glean valuable insights concerning client segments, the effectiveness of training programs, and product penetration. Advanced software helps develop more predictive and descriptive analytics. The efficiency of wealth managers is improving thanks to intelligent automation and analytics powered by artificial intelligence solutions.

Goal-based advice

[Paula de Vos of Synergist Wealth Advisors](#) also highlighted the increased focus on integrated, holistic, goal-based advice as a notable trend capable

of disrupting the market. Advisors are enhancing their competitive edge by delivering more than commoditized investment advice. This approach helps deliver superior results in wealth planning for life's changing circumstances.

Synergist Wealth Advisors LLC supports increased personalization

Managers looking to differentiate services focus on integration and personalization, which greatly improves customer experience. It is no surprise that an ever-increasing number of clients are getting accustomed to personalized wealth management services.

[Synergist Wealth Advisors LLC recommends](#) refining and custom personalization to every individual client needs to maximize satisfaction. Many high net worth individuals (HNWI) expect more value from personalized wealth management services that last a lifetime.

Omnichannel offerings attract more clients

The vast majority of high net worth individuals typically own wealth sources and investment portfolios. In such cases, several wealth advisors manage the investments, which encompass wide-ranging products. [Synergist Wealth Advisors sees new trends](#) and utilizes integrated platforms and approach to centralize management of clients' investment portfolios within the context of their overall wealth.

Paula is confident that the integrated approach streamlines a wealth managers' ability to handle investors' evolving needs. The combination of digital and human channels helps provide a seamless omnichannel experience. This strategy enables firms like [Synergist Wealth Advisors LLC to maximize](#) client time and results.