

# Wealth Management Outlook & Insights (2025–2027)

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## Wealth Management

### **\*\*Outlook:\*\***

Wealth under management (WUM) is forecast to exceed \$150 trillion globally by 2027, with personalized advisory models, AI-powered planning tools, and generational wealth transfer being major drivers.

### **\*\*Key Trends:\*\***

- 70% of clients under 40 prefer hybrid or digital-only wealth models (Source: EY Global Wealth Report)
- AI-based financial planning will drive 50% of portfolio rebalancing decisions by 2026
- \$84 trillion in wealth is expected to transfer across generations in the next 20 years (Source: Cerulli Associates)

### **\*\*Strategic Implications:\*\***

Wealth firms must adopt hybrid advisory models, integrate behavioral finance, and enhance estate/tax planning strategies to capture next-gen clients.