

WEALTH MANAGEMENT

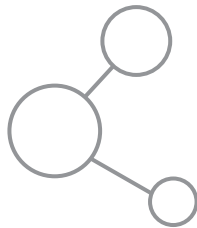


TOP 100 INFLUENCERS

inside

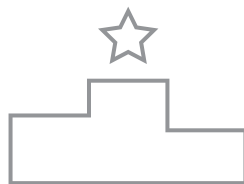


Methodology



Network Map

Top 100 List



methodology

Onalytica's PageRank based methodology is used to extract influencers on a particular topic and takes into account the number and quality of contextual references that a user receives – this allows us to identify Topical Authority (reference) – our priority influence metric.

We analyzed topical authority via their social engagement on Twitter and how much influencers were referenced in association with wealth management on Instagram, Facebook, YouTube, Forums, Blogs, News and Tumblr content. These calculations also take into account a user's resonance (topical engagement) relevance (number of posts on topic, and % relevance - the proportion of their social content on the topic) and reach (number of followers).

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the
data



365
days



7,644,066
posts

WHAT IS WEALTH MANAGEMENT AND WHY IS THE MARKET CHANGING?

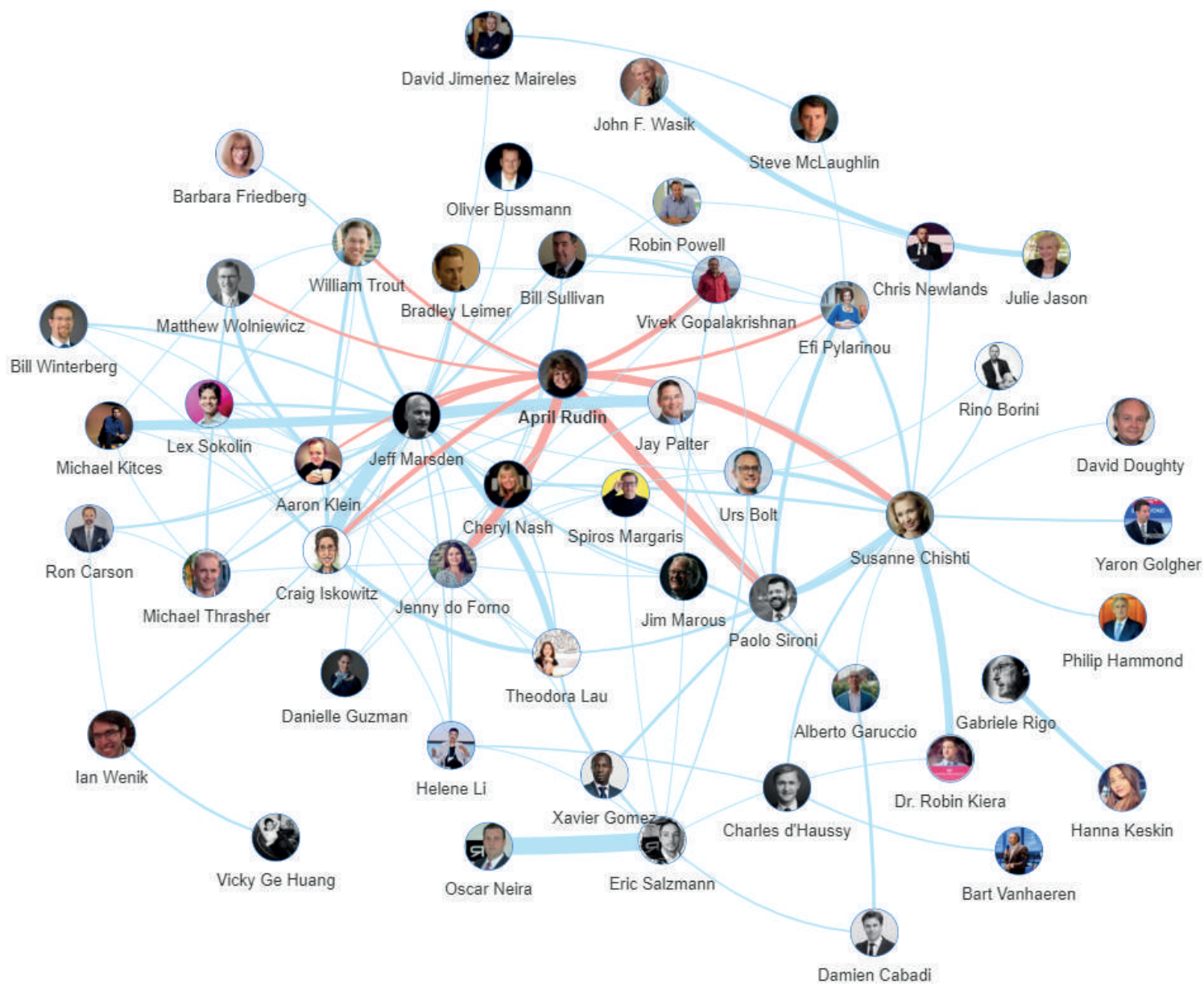
Wealth Management incorporates financial planning, investment portfolio management and a number of aggregated financial services. Wealth management is more than just investment advice, it can encompass all parts of a person's financial life. Wealth management customers often benefit from a holistic approach in which a single manager coordinates all the services needed to manage their money and plan for their own or their family's current and future needs. Some wealth managers prefer to specialise in particular areas due to their expertise, or the needs of the customer.

The market is evolving quickly due to technological developments and stricter regulations. To prepare for economic success Wealth Managers are developing more strategic changes to their value propositions and having to adapt to a new digitised business model.

MAPPING THE COMMUNITY

We were very interested in seeing which individuals were leading the discussion around wealth management, so using a comprehensive Boolean search query we analysed over 7.6M posts mentioning all the keywords we identified from 20th February 2018 to 20th February 2019. We then identified the top 100 most influential individuals leading the discussion on social media. What we discovered was a very engaged community, with much discussion between individual influencers. Overleaf you will see a network map of the online conversation around wealth management. The top influencer April J. Rudin is at the centre. This map was created with the Onalytica platform.

Interactions between influencers discussing Wealth Management



This map was created using the Onalytica platform.

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WHAT ARE THE EXPERTS SAYING?

We reached out to some of the top 20 influencers to ask them for their views on Wealth Management. We spoke to April J. Rudin (#1), Theodora Lau (#2), Urs Bolt (#4), Oscar Neira (#6), Spiros Margaritis (#7) and Robin Powell (#15). Be sure to follow them to stay up to date on the best content and resources on Wealth Management!



April J. Rudin - Global Wealth Marketing Strategist Founder and CEO at The Rudin Group

"This is a very exciting time in wealth management due to the confluence of wealth transfer and creation, recent technological advancements, and the rise of millennial preferences. Just in the past couple years, we've seen unprecedented transformation in the ways wealth management

services are both bought and sold. Firms must morph their brands, infrastructure and offerings to meet changing global demands. Client wants and needs are changing globally, regulatory environments are becoming stricter, and a variety of technological advances are rapidly impacting the way wealth management firms do business. Old business models and mindsets need to be discarded for new models and ideas that engage with clients of all ages, but particularly millennial clients. Today's client is looking for a transparent fee structure, customized offerings, and a smooth client experience as offered by some of the BigTech firms. All of this makes 2019 a pivotal year for those in the wealth management and/or wealthtech space."



Theodora Lau – Speaker, Writer, Startup Advisor and Founder of Unconventional Ventures

"As we live longer lives and multi-generational households become more commonplace, wealth managers must be more thoughtful in helping their clients manage their finances and navigate new challenges that arise from increased longevity and less structured careers. As retirement is redefined – how might we envision a new way of living a purposeful

multi-stage life? While emerging technologies such as artificial intelligence and advanced data analytics will continue to play an increasingly vital role – customer centricity and empathy will be the true north star for the industry. Wealth management solutions must act with the best interest of the customers at heart – to be a true fiduciary, and they must evolve, as the needs of the society changes. The future of wealth management will take a holistic view of the customer's well-being – to help usher in a financially secure future for everyone."



Urs Bolt – Advisor at bolt.now

"WealthTech is in some ways lagging behind the better known big brother FinTech, which covers mostly basic banking services. Many have heard of the popular term Robo-Advisory, which is part of the broader category WealthTech. There is a large untapped potential for digital wealth management. The rapid accumulation of wealth, especially in

emerging economies led by China, will require a large and diverse ecosystem for digital wealth management, financial planning services across all segments. It's also the emerging markets which are more open to use mobile apps on smartphones which are the platforms accessible for almost all savers, micro, affluent and high net worth investors alike.

My background in wealth management and private banking enables me to add my experience and thought leadership to the development in this increasingly digitalised environment. I am excited to be part of this journey!"



Oscar Neira – Banking and Fintech Consultant for Codd&Date and Correspondent at Money Today

"Aggregation and Visibility of the complete Wealth. This is nothing new but in 2019 the importance and adoption in B2B will increase. Not just for Bankable but especially for non-Bankable assets. I mean not just Art, Cars, Jewelry, Yachts but also Real Estates, the Family owned Company and Investments in other private owned established companies or start ups. But

of course also Cryptoassets are part of that. If a Family Officer/ Wealth Manager/ Investment Advisor wants to advise having the whole view of his client, then he need Tech solutions. Solutions to mount the complete database, technology to put all together and map it in a "sexy" way and finally tools to create the perfect portfolio as well as tools to make predictions and simulations.

Not yet but for sure if there is a litigation the regulator and the justice will consider Banks (good?) advise if that was based having the whole view and not just based on the assets which the Bank or the EAM got under management.

Increasing regulation means much more work. Tech need to help in solving KYC, AML and ongoing compliance needings. What means #WealthTech and #RegTech goes hand in hand."



Spiros Margaris – Venture Capitalist, founder of Margaris Ventures & Global No.1 Fintech Influencer

"Wealthtech, a sub-category of fintech, will drive the digital transformation of the investment and asset management industry. I predict that in a few years many people (especially the younger generations) will have a different understanding of how their wealth should be managed. Wealth

management will feel nothing like the way their parents have known or experienced it and wealthtech will drive that change. When it comes to wealthtech, you ain't seen nothin' yet."



Robin Powell – Freelance journalist, Editor of two blogs, The Evidence-Based Investor and Adviser 2.0, Founder of Regis Media

"It's a great honour to appear on this list of wealth management's biggest influencers, alongside so many talented and inspiring people. This is a critical, but also a hugely exciting, time for investors worldwide. For too long, the focus has been on the industry and on serving the interests of all

different links in the value chain. But the person who really matters is the consumer, the end investor. As the late Jack Bogle rightly reminded us, it's the consumer who takes all of the risk and provides all of the capital. It's their money. The firms that thrive in the future will be those who put the consumer's interests first. There are big obstacles to overcome. But as long as we can align the interests of wealth managers more closely with those of investors, there is massive potential to improve consumer outcomes and to change lives for the better."



Top 100 Influencers

INFLUENCERS 1 - 50

| Rank | Name | Twitter Handle | Role | Influencer Score |
|------|--------------------|------------------|--------------------------------|------------------|
| 1 | April Rudin | TheRudinGroup | Entrepreneur | 100.00 |
| 2 | Theodora Lau | psb_dc | Entrepreneur | 72.98 |
| 3 | Jim Marous | JimMarous | FinServ Professional | 65.44 |
| 4 | Urs Bolt | UrsBolt | FinServ Professional | 65.37 |
| 5 | Michael Kitces | MichaelKitces | Entrepreneur | 60.37 |
| 6 | Oscar Neira | NeiraOsci | Journalist | 54.62 |
| 7 | Spiros Margaritis | SpirosMargaritis | FinServ Professional | 49.60 |
| 8 | Philip Hammond | PhilipHammondUK | Politician | 48.34 |
| 9 | Clare Flynn Levy | cflynnlevy | Entrepreneur | 42.85 |
| 10 | Susanne Chishti | SusanneChishti | C-suite | 38.27 |
| 11 | Jay Palter | jaypalter | Comms & Marketing Professional | 37.18 |
| 12 | Claer Barrett | ClaerB | Journalist | 36.91 |
| 13 | Helene Li | helene_wpli | Entrepreneur | 36.48 |
| 14 | Ron Carson | rchusker | Entrepreneur | 33.86 |
| 15 | Robin Powell | RobinJPowell | Journalist | 31.66 |
| 16 | Vicky Ge Huang | Vlajournaliste | Journalist | 28.65 |
| 17 | Sallie Krawcheck | SallieKrawcheck | Entrepreneur | 28.15 |
| 18 | Conor Coughlan | Capital_FinServ | C-suite | 27.46 |
| 19 | Xavier Gomez | Xbond49 | Entrepreneur | 24.16 |
| 20 | Aaron Klein | AaronKlein | C-suite | 23.70 |
| 21 | Craig Iskowitz | craigiskowitz | Entrepreneur | 22.85 |
| 22 | Bill Sullivan | WFSULLIVAN3 | C-suite | 22.40 |
| 23 | Bradley Leimer | leimer | Entrepreneur | 21.74 |
| 24 | Gregory Silberman | g_silberman | FinServ Professional | 20.85 |
| 25 | Virginie O'Shea | virginieoshea | FinServ Professional | 19.03 |
| 26 | George Mentz | GeorgeMentz | Legal Professional | 19.00 |
| 27 | Lex Sokolin | LexSokolin | Entrepreneur | 18.60 |
| 28 | Gabriele Rigo | gab_rigo | Entrepreneur | 18.39 |
| 29 | Andreas Staub | andi_staub | FinServ Professional | 18.38 |
| 30 | Cheryl Nash | cherylnash2 | FinServ Professional | 17.93 |
| 31 | Efi Pylarinou | efipm | FinServ Professional | 17.79 |
| 32 | David Craig | davidwicraig | C-suite | 16.64 |
| 33 | Danielle Guzman | guzmand | Comms & Marketing Professional | 15.93 |
| 34 | Matthew Wolniewicz | mwalno | FinServ Professional | 14.73 |
| 35 | Nick Bilodeau | FinMKTG | Comms & Marketing Professional | 13.74 |
| 36 | William Trout | williamtrout | FinServ Professional | 13.61 |
| 37 | Bart Vanhaeren | VanhaerenBart | Entrepreneur | 13.33 |
| 38 | Tripp Braden | TrippBraden | FinServ Professional | 13.15 |
| 39 | Bill Winterberg | BillWinterberg | Tech Professional | 12.30 |
| 40 | Oliver Bussmann | obussmann | Entrepreneur | 11.79 |
| 41 | Alex Jiménez | RAlexJimenez | FinServ Professional | 11.51 |
| 42 | Damien Cabadi | Damien_CABADI | FinServ Professional | 11.02 |
| 43 | Barbara Friedberg | barbfriedberg | FinServ Professional | 10.96 |
| 44 | Jeff Marsden | Jeff_Marsden | Tech Professional | 10.68 |
| 45 | Mark Kleinman | MarkKleinmanSky | Journalist | 10.16 |
| 46 | Eric Salzmänn | Salz_Er | Entrepreneur | 10.12 |
| 47 | Chris Newlands | newlands_chris | Journalist | 9.86 |
| 48 | Julie Jason | RetireSecureNow | Entrepreneur | 9.69 |
| 49 | David Doughty | daviddoughty | FinServ Professional | 9.54 |
| 50 | Yaron Golgher | yaron_gol | Entrepreneur | 9.44 |

INFLUENCERS 51 - 100

| Rank | Name | Twitter Handle | Role | Influencer Score |
|------|------------------------|-----------------|--------------------------------|------------------|
| 51 | Raphaël Cretinon | RCretinon | FinServ Professional | 9.29 |
| 52 | Paolo Sironi | thepsironi | FinServ Professional | 9.01 |
| 53 | Katherine Griffiths | KGriffithsTimes | Journalist | 8.73 |
| 54 | Jenny do Forno | jennydoforno | Comms & Marketing Professional | 8.68 |
| 55 | Ryan W. Neal | ryanWneal | Journalist | 8.47 |
| 56 | Michael Thrasher | Mike_Thrasher | Journalist | 8.39 |
| 57 | Conor Witt | ckwitt3 | FinServ Professional | 8.02 |
| 58 | Dr. Robin Kiera | stratorob | Tech Professional | 7.60 |
| 59 | Ian McKenna | ianmckennaftc | FinServ Professional | 7.57 |
| 60 | Rick Huckstep | rickhuckstep | Tech Professional | 7.46 |
| 61 | Lauren Young | LaurenYoung | Journalist | 7.45 |
| 62 | Shaun Port | ShaunPort | FinServ Professional | 7.40 |
| 63 | Heather Hazelwood | HHazelwoodEsq | Legal Professional | 7.38 |
| 64 | Vivek Gopalakrishnan | vivek_gkrishnan | Comms & Marketing Professional | 7.30 |
| 65 | Martin Huete | martinhuete | FinServ Professional | 7.25 |
| 66 | Rino Borini | rinoborini | Entrepreneur | 7.10 |
| 67 | David Jimenez Maireles | davidjmaireles | FinServ Professional | 7.09 |
| 68 | Charles d'Haussey | charlesdhaussey | Tech Professional | 7.06 |
| 69 | Nasir Zubairi | naszub | C-suite | 6.94 |
| 70 | Hanna Keskin | HannaKeskin | Entrepreneur | 6.73 |
| 71 | John F. Wasik | johnwasik | Journalist | 6.53 |
| 72 | Minh Q. Tran | Minh_Q_Tran | FinServ Professional | 6.50 |
| 73 | Martin Moeller | ImMBM | FinServ Professional | 6.46 |
| 74 | Tony Vidler | TonyVidler | FinServ Professional | 6.22 |
| 75 | John Lloyd IV | jalloyd4 | C-suite | 6.16 |
| 76 | Chelsea Emery | chelsea_emery | Journalist | 6.14 |
| 77 | Margot Patrick | margotpatrick | Journalist | 6.08 |
| 78 | Karen McDermott | KMcDSAP | FinServ Professional | 6.01 |
| 79 | Steve McLaughlin | FTPpartners | Entrepreneur | 5.97 |
| 80 | Ian Wenik | IanWenik | Journalist | 5.84 |
| 81 | Alberto Garuccio | albertogaruccio | FinServ Professional | 5.82 |
| 82 | Koen Vanderhoydonk | KVanderhoydonk | Entrepreneur | 5.79 |
| 83 | Andy Agathangelou | TransparencyTF | Entrepreneur | 5.69 |
| 84 | Abraham Okusanya | AbrahamOnMoney | Entrepreneur | 5.66 |
| 85 | Penny Crosman | pennycrosman | Journalist | 5.61 |
| 86 | Lawrence McDonald | Convertbond | Entrepreneur | 5.56 |
| 87 | Florian Semle | floriansemle | Comms & Marketing Professional | 5.39 |
| 88 | Christopher Pierson | DrChrisPierson | Entrepreneur | 5.37 |
| 89 | Yolanda Bobeldijk | YEBobeldijk | FinServ Professional | 5.35 |
| 90 | Jason Butler | jbthewealthman | FinServ Professional | 5.29 |
| 91 | Noel Peatfield | noelpeatfield | Comms & Marketing Professional | 5.15 |
| 92 | Antonio Selas | AntonioSelas | Legal Professional | 5.02 |
| 93 | David Bundi | DavidBundiRisk | Legal Professional | 4.72 |
| 94 | Howard Strauber | HowardStrauber | FinServ Professional | 4.68 |
| 95 | Cara Williams | carabwilliams | FinServ Professional | 4.59 |
| 96 | Daniel Diemers | DanielDiemers | FinServ Professional | 4.58 |
| 97 | Laurent Nizri | LNizri | Entrepreneur | 4.56 |
| 98 | Dr. Debashis Dutta | debashis_dutta | FinServ Professional | 4.47 |
| 99 | Tim Burke | _tim_burke | Journalist | 4.44 |
| 100 | Andy Waar | ndwr | Entrepreneur | 4.13 |

Why not head over to our blog and check out some of our other content?

We have a lots more influencer lists on there, as well as best practice guides and influencer interviews.

TAKE ME THERE!

We also have an influencer marketing platform which allows you to discover, activate and manage influencers and drive up to 5x more reach and engagement with your target audience.



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