

2018 U.S. Private Banks and Trust Companies: Asset Management Opportunities



RESEARCH OVERVIEW

Industry professionals can participate in Cerulli research through either topical research interviews or confidential surveys. In return, participants receive research findings or benchmarking reports for their participation. All information is aggregated to protect the anonymity of specific firms and respondents. Data collected is used across all Cerulli products.

TARGET AUDIENCE

Asset Management firms and ETF Sponsors currently partnering, or looking to partner with Private Banks and Trust Companies

LAUNCH

1Q 2018

SURVEY OVERVIEW

This survey is intended to gain insight into the strategies of asset managers currently partnering, or attempting to partner, with high-end bank wealth management platforms. Areas of focus include product demand, reaching key decision-makers, and assembling sound distribution strategies and salesforces.

This Initiative Explores these Key Industry Trends

- Banks modernizing their capabilities and processes to better align with competitors
- Opportunities and challenges of banks recognizing the need for open architecture
- Best practices in mapping opportunities and designing effective distribution strategies within bank departments

HOW TO PARTICIPATE

1. Register

Contact us or click the "Register Now" button below

[REGISTER NOW](#)

2. Complete

Interview participants

Research interviews will take 30–60 minutes to complete

Survey participants

Survey length varies, but typically takes 10–20 minutes to complete

3. Receive

Interview participants

Key Findings: Overview of the findings from our upcoming 2018 U.S. Private Banks & Trust Companies report

Survey participants

Complimentary Research: A copy of a relevant issue of The Cerulli Edge

Benchmarking Report: Custom report of this survey highlighting your firm's responses in comparison to the survey aggregate

CONTACT US

For more information about this research initiative, contact: surveys@cerulli.com

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