

CUSTOM CONTENT

MARCH 24, 2025

LEADERS OF INFLUENCE: Wealth Managers



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There are some truly outstanding professionals making up the Los Angeles wealth management landscape. We've shone the spotlight on some of the very best of them here, along with information about their careers, practice and a quick look at what makes them so good at what they do.

Congratulations to the trailblazing professionals who made this list and thank you for your contributions to the local economy and the financial stability of the individuals and families that live here.

Methodology: The professionals featured in these pages did not pay to be included. Their profiles were drawn from nomination materials submitted to the Los Angeles Business Journal. Those selected for inclusion were reviewed by the editorial department. The professionals were chosen based on a demonstration of impact made on the profession and on the Los Angeles community.

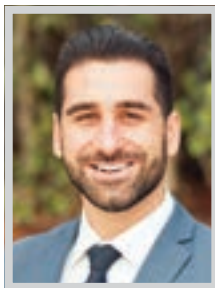
LEADERS OF INFLUENCE: WEALTH MANAGERS

**MIKE AMASH**

Partner; President
Westmount Partners

Mike Amash joined Westmount Partners in 2002 as a senior portfolio advisor, drawn to the firm's fiduciary approach that sought to eliminate conflicts of interest and align the goals of the client and firm. He was named President in 2022 and went on to institute several initiatives to further enhance client service and retention, as well as strengthen the firm's internal company culture. Westmount achieved a 99.4% client retention rate in 2024.

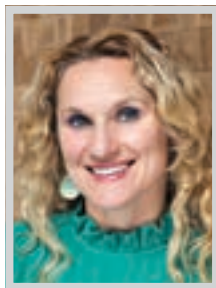
Before being named president, Amash was a longtime member of Westmount's investment committee, where he advocated for having strong investment capabilities in unique and compelling corners of the markets. He also supported the inclusion of robust financial planning, tax, and estate planning capabilities, and was responsible for recruiting several key hires in those areas.

**SHYAN ARDALAN**

Managing Director
Merrill Wealth Management

A principal with The Ardalan Wealth Management Group, Shyan Ardalan serves as managing director, providing an array of services and customized strategies to affluent individuals whose hard work and achievements have led to substantial and often increasing wealth. Among them are successful business owners, entrepreneurs, corporate executives of both public and private companies, entertainment professionals and a select number of professional athletes.

Having grown up amongst a number of commercial bankers, Ardalan has a deep understanding of middle-market companies and the needs of their executive teams. He was born in Woodland Hills, and currently lives in the heart of Los Angeles.

**PATRICE BENING**

Wealth Advisor
Morton Wealth

Wealth advisor Patrice Bening is one of the curators of 'Herself by Morton,' an educational platform focused on women investors. With the platform, she aims to create a space that encourages women to talk about wealth, get curious about money habits, share their stories, and have access to professional support and resources.

For the last 10 years, Bening has been a part of ProVisors, a national networking organization focused on bringing professionals together to collaborate. Additionally, she holds the treasurer position on the board of the National League of Young Men, a non-profit organization for young men in grades 9-12, focused on bringing mothers and sons together through charitable and community service, cultural experiences, and protocol education.

**DARNEL BENTZ**

Senior Wealth Advisor
Kayne Anderson Rudnick

Darnel Bentz is a senior wealth advisor at Kayne Anderson Rudnick (KAR) with 24 years of experience in the investment management industry. He focuses on building customized portfolios and financial plans that integrate traditional investments and alternative investment strategies.

In 2024, Bentz continued to successfully grow his wealth management practice and brought in over \$34 million in new client assets. His professional priority is for clients to experience the highest-quality service, gain peace of mind and have confidence that their life goals are obtainable and can be achieved. He also serves on KAR's Wealth Advisory Investment Committee, which is responsible for selecting and monitoring the investment strategies made available to KAR's wealth advisory clients, as well as guiding asset allocation.

**JIM BERLINER**

Chairman
Westmount Partners

Jim Berliner is a co-founder of Westmount Partners, currently serving in the role of chairman. Under his leadership, Westmount has grown into one of Southern California's premier wealth management firms, managing more than \$5.8 billion in assets.

Berlinger began his career practicing law and was a federal prosecutor in the US Attorney's Office. In 1990, he established Westmount alongside his father. In the years that followed, he not only worked directly with clients but also played a pivotal role as the chair of Westmount's investment committee. As president, he helped the firm distinguish itself in several unique ways — most notably as an expert in alternative asset classes that typically move out of sync with the traditional stock and bond markets.

**MIKE CANNONE**

Partner; Managing Director
Westmount Partners

Since joining Westmount, Mike Cannone has established himself as a leader both inside and outside the firm, guiding the firm's marketing and business growth strategies and serving on the boards of numerous nonprofit organizations across Los Angeles.

Cannone has been directly responsible for originating nearly \$700 million in new client assets, as well as for accelerating the pace of assets under management (AUM) growth at the firm, hiring additional team members, implementing mentorship programs, expanding the firm's business development and marketing efforts, and broadening its geographic footprint. Over his tenure, the firm's AUM has more than tripled, now over \$5.8 billion. As managing director, he provides strategic direction for Westmount both externally as a business development leader and behind the scenes as a trusted mentor.

**BRIDGET COSTELLO**

Wealth Advisor
Kayne Anderson Rudnick

Maintaining a client retention rate of 100 percent, Bridget Costello's 17 years of experience in the investment management industry have helped refine the client service experience and create a foundation for success at Kayne Anderson Rudnick (KAR). She relishes the opportunity to provide clients with the financial peace of mind they need for major transitions in life such as marriage, childbirth and retirement.

Costello spent the first five years of her career as an account manager with Adviser Investments and was later a portfolio administrator and assistant vice president for One West Bank. Approaching ten years with KAR, Costello is a part of a five-person team that manages more than \$3 billion in client assets. Of the team's 193 client relationships, she independently oversees 78.

**HATEM DHIAB**

Managing Partner; Founding Member
Gerber Kawasaki Wealth and Investment Management

Hatem Dhiab is a founding and managing partner at Gerber Kawasaki Wealth and Investment Management, with a unique background that enables him to appeal to clients from diverse backgrounds. Raised in a family of bankers in Tunisia and France, he learned to be adaptable, self-reliant and responsible at an early age.

Dhiab's clients are mostly accomplished executives, professionals and entrepreneurs. His strength lies in working closely with them to develop customized investment strategies that meet their evolving needs. He then aligns those investment strategies within the broader wealth management architecture while constantly identifying new opportunities. Additionally, Dhiab founded the popular GK podcast Future Money and is deeply involved in the Los Angeles technology and start-up scene.

**TYRONE DINNEEN**

Financial Advisor
Northwestern Mutual

Newly appointed district director, Tyrone Dinneen's mission is to provide professionals, families and business owners with goal-based, wealth-building financial plans that will stand the test of time. By aligning knowledge of employer benefits with strategies around tax efficiency, wealth building and wealth preservation, Dinneen and his team create the ultimate value for their clients.

Since the beginning of his time at Northwestern Mutual, Dinneen's practice has grown from a one-man team to a team of seven professionals who are uniquely placed to provide clients with the highest level of service. Before joining Northwestern Mutual, he worked for 12 years with After School All Stars, an organization focused on closing the opportunity gap for students in low socioeconomic areas.

**CHRISTOPHER DYREK**

Senior Vice President;
Wealth Management Advisor
Merrill Lynch

Chris Dyrek is a senior vice president, wealth management advisor, and founder of the Dyrek Goehring Group for Merrill Lynch in Pasadena. An award-winning advisor, he leads a high-performing team of six seasoned advisors who are licensed in 25 states and oversee \$566 million in assets under management for his clients.

Dyrek started with Merrill Lynch in 1984, immediately after graduating from UCLA. Many of his first clients are still with him today, and he now serves two, three, and four generations of families. His work is inspired by his father who was raised during the Great Depression and his experience growing up with a fear of losing money. This experience became the cornerstone of his team's investment philosophy — "don't lose money, preserve capital."

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(left to right:) Tanja Krakovic, Vice President, Private Wealth Senior Business Manager, The Munster Freeman Group; Bruce Munster*,
Managing Director, Private Wealth Advisor, The Munster Freeman Group; Shyan Ardalan**, Managing Director, Wealth Management Advisor,
The Ardalan Wealth Management Group; Jeff Wood*, Managing Director, Private Wealth Regional Managing Director.*

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*Merrill Private Wealth Management professionals serve clients with \$10MM or more in investable assets and advisors offer a broad range of brokerage, investment advisory and other services, including investment analytics.

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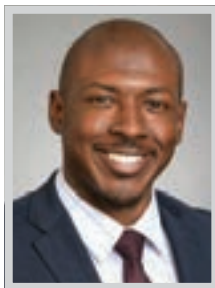
LEADERS OF INFLUENCE: WEALTH MANAGERS

**BRENTON HAMLET**

Managing Director; Wealth Management Advisor; Portfolio Manager
Merrill Wealth Management

An award-winning industry veteran with 25 years of experience in financial services, Brenton Hamlet and his six-person office provides a range of financial services and strategies to clients across 25 states, helping them achieve short- and long-term financial goals. Hamlet and his team have grown their business exponentially, with assets under management exceeding \$850 million. His specialty is creating financial strategies leading up to, during and following major liquidity and wealth creation events. He is also a certified sports and entertainment advisor.

A UCLA Law alum, Hamlet holds the Certified Investment Management Analyst designation sponsored by the Investment Management Consultants Association at the Wharton School. Prior to joining Merrill, he was a practicing member of the California Bar.

**DORIAN HARRIS**

Senior Vice President; Market Leader
Bank of America Private Bank

Dorian Harris is a senior vice president and market leader with Bank of America's Private Bank that serves ultra-high-net-worth individual, families and institutions. In this role, he helps to oversee more than 200 specialized financial professionals, spanning across multiple regions in Southern California. His team advises and provides sophisticated strategies to grow, protect, preserve and transfer client wealth through a comprehensive approach including investment management, credit, banking and wealth structuring.

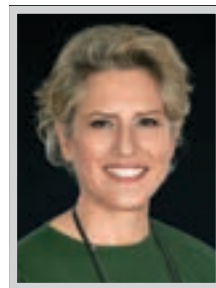
A financial industry veteran, Harris has worked across multiple disciplines with a primary focus on leadership and management within sales organizations for over two decades. During his tenure with the bank, he also worked in consumer and commercial credit, home loans, customer assistance and client retention.

**MOLLIE KAISER**

Partner; Private Wealth Advisor
Strategic View Advisors

Newly appointed partner at the firm, Mollie Kaiser is responsible for providing advice and guidance to Strategic View Advisors' clients. She has served on all of the firm's committees, most recently including the leadership, financial planning and investment committees.

Kaiser has been in the wealth management industry for over 15 years, bringing extensive experience from both Bernstein Global Wealth Management and Credit Suisse, where she handled a broad range of advising, planning, investment management, and client service responsibilities. She has an MBA from Pepperdine University and holds Series 7 and 63 licenses. She is a member of the South Bay Estate Planning Council, Estate Planning and Trust Council of Long Beach, C-Sweet, ProVisors, and the Financial Planning Association.

**TANJA KRAKOVIC**

Vice President;
Private Wealth Senior Business Manager
Merrill - Munster Freeman Group

Tanja Krakovic leads business operations for Merrill's Munster Freeman Group and has over fifteen years of small business experience. She holds a certificate in private capital markets and has an MBA in finance from Pepperdine University Graziadio School of Business & Management. In addition to being a wealth planner, Krakovic conducts daily team meetings and drives operational excellence. Her leadership is essential in driving high quality client experience and deepening relationships.

Krakovic has been involved with LEAD (Leadership, Education, Advocacy and Development) for Women, a volunteer women's organization within Bank of America for over 10 years. Additionally, she is on the board of Humansave, a non-profit organization dedicated to ending human trafficking.

**CARL LUDWIGSON**

Managing Director
Bel Air Investment Advisors

Carl Ludwigson began his career at Bel Air Investment Advisors in 2012 and has served as Bel Air's investment committee chairman since 2014. As managing director, he is a recognized expert in portfolio construction and client service for high-net-worth individuals, families, foundations, and endowments. He has played a key role in sourcing and structuring investment solutions across all asset classes, including equities, bonds and alternatives. Through carefully cultivated relationships and a meticulous approach to portfolio management, he tailors bespoke investment strategies that integrate long-term financial goals, risk mitigation and estate planning considerations.

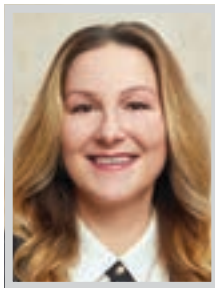
Before joining Bel Air, Ludwigson was an associate director at Pacific Alternative Asset Management Company, where he was responsible for hedge fund research.

**MARK MINICHELLO**

Chief Executive Officer
Quincy Cass Investment Management

Mark Minichiello, CEO of Quincy Cass Investment Management, exemplifies resilience, leadership and innovation in the investment management industry. Taking the helm during a time of distress, Minichiello made significant sacrifices to stabilize and reposition the firm for long-term success. Under his guidance, Quincy Cass has experienced transformative growth, doubling its assets and expanding its team.

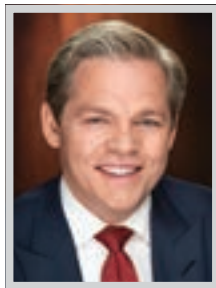
In addition to financial success, Minichiello has championed the integration of younger talent into the firm, building a sustainable pipeline through the Northeastern University co-op program. By bringing in students for six-month stints, he ensures they gain meaningful, hands-on experience, contributing to the firm's operations and growth. He is also vice-chair of Northeastern's Southern California Executive Leadership Council.

**SONJA MORO**

Vice President; Art Services Specialist
Bank of America

Sonja Moro is a vice president and art services specialist with Bank of America in Los Angeles, with a specialized expertise at the intersection of art and finance. She provides comprehensive insights on the art market, analysis of industry shifts, and tax considerations for dozens of clients throughout California, the Pacific Northwest, Texas and Colorado. She works closely with high-net-worth individuals as well as arts and culture nonprofits to provide tailored advice for every stage of art collecting, including market intelligence and strategy, sell-side advisory, and art finance.

Prior to joining Bank of America, Moro was a senior specialist of Post-War and Contemporary Art at Bonhams Los Angeles and worked as an art appraiser with Jacqueline Silverman and Associates, Inc. for over a decade.

**BRUCE MUNSTER**

Managing Director
Merrill Private Wealth Management

Bruce Munster is a principal of the Munster Freeman Group, an M&A-focused wealth advisory practice within Merrill Private Wealth Management with offices in Los Angeles, Scottsdale, AZ and Denver, CO. He serves a wide range of clients, including entrepreneurs, professional entertainers, professional investors, as well as the heads of investment banks and private equity firms.

Munster and his team advise clients on their personal wealth management concerns related to M&A transactions across a variety of industries, including technology, specialty finance, consumer products, business services and space. He earned his B.S. in business management and marketing from Cornell University while working part-time, participating on the varsity wrestling team, and raising a young family.

**JOHN PETRICK**

Senior Managing Director
Perennial Financial Services

John Petrick wears many hats as the senior managing director and co-founder of Perennial Financial Services. He manages his own book of business, helping his clients plan for their financial futures, and has driven the company's parabolic growth — advisor headcount has increased by six times and assets under management by fifteen times in just the last seven years.

Petrick served as the president of the Palisades Chamber of Commerce from 2010 to 2011 and has been a member of the board of directors and the executive committee for 14 years. He has also held positions such as first vice president of the Palisades Americanism Parade Association (P.A.P.A.) and the Palisades Posse, where he worked to promote a safe business environment.

**KEVIN PHILIP**

Partner
Bel Air Investment Advisors

With over two decades at Bel Air Investment Advisors, Kevin Philip has had a monumental impact on the practice's evolution. He possesses an acute understanding of the societal, geopolitical and economic factors that contribute to the ebbs and flows of global financial markets, and he communicates those factors to his clients with a personalized, high-touch approach, emphasizing the value of a long-term investing perspective.

As head of the practice's strategic initiatives committee, Philip drives the expansion of investment offerings. His advisor team oversees and manages \$2.5 billion AUA for roughly 80 ultra-high-net-worth families. Moreover, he has been an integral piece of the growth of Bel Air's practice-wide client roster, increasing AUM from just over \$3 billion at his start to over \$12 billion today.

LEADERS OF INFLUENCE: WEALTH MANAGERS

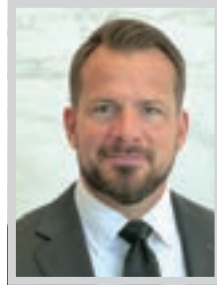


ERIK RIDGLEY

CEO; Chief Investment Officer
Salem Partners Wealth Management

Erik Ridgley, CFA is CEO and chief investment officer of Salem Partners Wealth Management, a fiduciary registered investment adviser (RIA) firm that combines institutional investment expertise with personalized financial planning and customized portfolios. In 2024, Ridgley navigated his clients through markets impacted by geopolitical volatility by continuing to patiently invest for the long-term per each client’s custom investment policy statement. He kept the focus on efficient portfolio management and consistent and predictable processes such as portfolio rebalancing, tax-loss harvesting and tax deferral.

Prior to joining Salem Partners, Ridgley was managing director of Citigroup Private Bank, where over 12 years he served as head of investments for the Western US Region and senior investment counselor, supervising \$1.2 billion of assets.



DANIEL ROONEY

Managing Director
Northwestern Mutual

An expert in wealth preservation and retirement planning, Daniel Rooney and his team work with clients entering each chapter of life, helping them to realize their goals and make progress towards a financially sound future. Rooney’s specialty is in working with medical device professionals, physicians, attorneys and business owners to uncover the tailored solutions best suited to each party’s needs. His unique approach to planning is defined by an emphasis on choice and optionality.

Prior to following in his family footsteps of becoming a financial advisor, Rooney spent well over a decade working in the medical device space. He traveled the globe developing emerging markets in countries like Japan, Australia, Europe, Asia and Latin America.

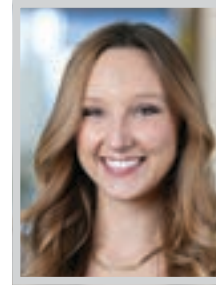


MIKE RUDOW

Wealth Advisor; Partner
Morton Wealth

With Morton Wealth, Mike Rudow has played a pivotal role in helping clients navigate business exits — particularly those who believed their businesses had little to no transferable value prior to engaging him. By guiding business owners through strategies to de-risk and decentralize themselves from their businesses, Rudow has helped owners create transferable enterprise value while aligning their business outcomes with their personal and financial goals.

Rudow made a significant career transition, shifting from the health and fitness industry and his work as a trapeze artist to becoming a successful financial advisor. Today, he holds a series 7, series 66, CFP, MBA, CEPA, AIF, and CFS designation and manages a large book of business, guiding clients toward achieving their financial aspirations.

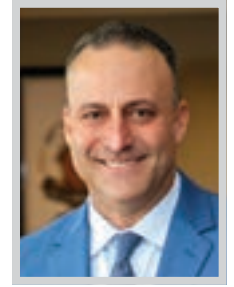


MIA SAMSON

Wealth Advisor; Director of Marketing
Gerber Kawasaki Wealth and Investment Management

Mia Samson is an investment advisor representative and was recently named the director of marketing at Gerber Kawasaki. In 2020, she earned the Certified Digital Assets Advisor designation to gain an advanced understanding of the evolving cryptocurrency landscape. At Gerber Kawasaki, she works to ensure that the company’s brand and messaging are in line with their investment decisions. She collaborates with all members of the firm to develop business opportunities with a large audience.

Using social media, Samson has grown recognition as an advisor. With her direction, Gerber Kawasaki has grown to over 345K followers on X, 9K on Youtube, and 16K on TikTok. She uses these channels to educate the younger generations on essential financial knowledge that typically is not taught in schools.



JASON SHAPIRO

Senior Vice President
WestPac Wealth Partners

Prior to his role at Westpac Wealth Partners, Jason Shapiro dedicated 15 years to Northwestern Mutual. At the firm, he quickly emerged as a leader, gaining immediate recognition for his impactful contributions to his clients. In 2012, he earned Forum status, placing him among the top 2% of the firm’s professionals, a feat he achieved over the next 11 campaigns.

Shapiro is a graduate in communications from the University of California-Davis. Following his time as a minor league baseball player with the Chicago White Sox organization, he spent 13 years in the mortgage lending industry, both on the retail and wholesale side. Through his work, Shapiro continues to exhibit a combination of leadership, hands-on service, financial commitment and family involvement.

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LEADERS OF INFLUENCE: WEALTH MANAGERS

**BRETT SIFLING**

Wealth Manager; Director of Get Invested
Gerber Kawasaki Wealth
and Investment Management

A highly influential wealth advisor, Brett Sifling started investing at an extremely young age. While studying finance at Loyola Marymount University, Sifling was handed a piece of the school's endowment portfolio to invest and manage. As post-graduate doors began opening for him, he partnered with famed financial personality Ross Gerber to grow his skills.

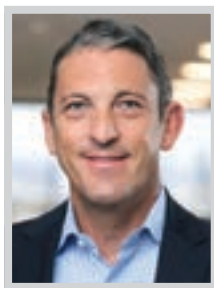
Since joining the firm in 2013, Sifling has grown a significant book of business, actively managing assets for hundreds of clients. He creates value for his clients by deeply understanding their needs, designing personalized gameplans, and simplifying financial concepts. At the firm, Sifling has spent years building the Get Invested program, which focuses on teaching first-time investors basic financial principles.

**MARK UDIS**

Partner
Certiuty

Mark Udis is a partner of Certiuty, where focuses on individuals and families of significant financial resources and is actively involved in the family office practice. He is also an active member of Certiuty's investment strategy team. Udis' client base is made up of technology entrepreneurs and executives, business owners, professional athletes, attorneys, doctors and prominent families. He believes that honesty, integrity and authenticity are the core of the client experience, and he strives to incorporate those values into everything he pursues.

Outside of the office, Udis sits on the advisory board of directors of Team IMPACT Los Angeles, an organization that tackles the emotional trauma and social isolation experienced by children facing serious and chronic illnesses by matching them with a college athletic team.

**MICHAEL WAXBERG**

Private Wealth Advisor
Fortify Capital | Wealth Management
& Insurance Services

Michael Waxberg has spent over two and half decades building a nationally recognized investment and financial planning practice, and is deeply rooted in the legal, entertainment and business communities advising on comprehensive retirement, investment and estate planning strategies.

Waxberg and his team at Fortify Capital work closely with clients to make a comprehensive assessment of their goals and planning needs. They then use this information to create and track a financial plan which include risk planning, pre-tax and after-tax savings strategies, investment management, retirement distribution and estate planning. His team is dedicated to a multi-generational approach in its work with clients, aiming to provide long-term continuity and support.

**ALYSSA WEINBERGER**

Senior Managing Director;
Chief People Officer
Lido Advisors, LLC

Alyssa Weinberger is a third generation CPA who started her career at Rothstein Kass & Co. (now KPMG). She joined Lido Advisors, LLC in 2004 and ultimately became the first female partner of the company. She also serves as president of Lido Consulting Group, LLC.

Weinberger created the annual Family Office Investment Symposium, now in its 19th year, which is a national conference that brings together family office attendees interested in networking with their peers and learning best practices in the family office arena. In 2020, she also created and produced "Lido Live," a monthly educational webinar series that covered a wide range of topics geared toward the family office and high net-worth investment community.

**JEFF WOOD**

Regional Managing Director
Merrill Private Wealth Management

Jeff Wood joined Merrill Lynch Wealth Management in 1993 after a distinguished active duty and reserve career serving in the United States military as a naval commander and flight officer. Throughout his career with the firm, has served as a wealth management advisor and market executive in several locations across the US. He was named to his current position with Merrill Private Wealth Management in 2019.

Wood holds a B.A. degree from the University of Maryland, an M.S. degree from the University of Southern California, and is a graduate of the Securities Industry Institute program at the Wharton School, University of Penn. He is also active in various veteran support organizations and military service advocacy groups.

Wealth Management Industry Set to Reach \$3.5 Trillion by 2033

Digital solutions and robo-advisory set to shape the industry's growth

According to the "Wealth Management Market Opportunities and Strategies to 2033" report issued earlier this year by ResearchAndMarkets.com, the global wealth management market reached a value of nearly \$1.8 trillion in 2023, having grown at a compound annual growth rate (CAGR) of 11.69% since 2018. The market is expected to grow from \$1.8 trillion in 2023 to \$2.5 trillion in 2028 at a rate of 7.03%. The market is then expected to grow at a CAGR of 6.94% from 2028 and reach \$3.5 trillion in 2033.

Growth in the historic period resulted from the increased internet penetration, rise in the number of high net worth individuals, increasing investments and rising government support. Factors that negatively affected growth in the historic period include rising cyber crime risk, pressure on fees and increasing fintech firms.

Going forward, the rising demand for alternative investments, strong economic growth in emerging markets, increasing digitization, increasing retiree population, rising urbanization and increasing wealth of high net worth individuals will drive the market. Factors that could hinder the growth of the wealth management market in the future include wide range of services offered by asset managers, passive investments and stringent regulations.

The wealth management market is segmented by type of asset class of asset class into

equities, fixed income, alternative assets and others. The fixed income market was the largest segment of the wealth management market segmented by type of asset class of asset class, accounting for 64.43% or \$1.16 trillion of the total in 2023. Going forward, the alternative assets and others segment is expected to be the fastest growing segment in the wealth management market segmented by type of asset class of asset class, at a CAGR of 10.41% during 2023-2028.

The wealth management market is segmented by type of wealth manager into private banks, investment managers, full-service wealth managers, stockbrokers, and other type of wealth manager. The private banks market was the largest segment of the wealth management market segmented by type of wealth manager, accounting for 38.94% or \$707.13 billion of the total in 2023.

North America was the largest region in the wealth management market, accounting for 51.63% or \$937.45 billion of the total in 2023. It was followed by Western Europe, Asia-Pacific and then the other regions.

The top opportunities in the wealth management market segmented by type of asset class of asset class will arise in the fixed income segment, which will gain \$451.18 billion of global annual sales by 2028. The top opportunities in the wealth management market by type of wealth manager will arise in the private banks segment, which will gain \$260.56 billion of global annual sales by 2028. The top opportunities in the wealth management market by enter-

The rising demand for alternative investments, strong economic growth in emerging markets, increasing digitization, increasing retiree population, rising urbanization and increasing wealth of high net worth individuals will drive the market.



prise size will arise in the large enterprises segment, which will gain \$463.34 billion of global annual sales by 2028. The top opportunities in the wealth management market by enterprise size will arise in the human advisory segment, which will gain \$668.05 billion of global annual sales by 2028. The wealth management market size will gain the most in the USA at \$170.26 billion.

To take advantage of the opportunities, the analyst recommends the wealth management companies to focus on innovative digital solutions, focus on streamlining technology solutions, focus on developing ERP solutions for family offices, focus on integrating traditional

and modern investment strategies, focus on implementing AI tools for financial advisory efficiency, focus on integrating life insurance with financial planning tools, focus on alternative assets segment, focus on investment managers segment, focus on large enterprises segment, focus on robo advisory segment, expand in emerging markets, focus on expanding distribution channels, focus on developing competitive pricing strategies, continue to use B2B promotions, focus on building strategic partnerships and focus on strengthening client relationships.

For more information about this report visit [researchandmarkets.com](https://www.researchandmarkets.com).