

November 2013

Affluent Investing - UK

“Three quarters of affluent consumers are saving for their retirement, which is a much higher proportion than across the wider population. For wealth management firms, promoting SIPPPs and other pension products should be an important strategy in a bid to capitalise on the demand for retirement savings – and thus ...

Savings and Investing - Intermediary Focus - UK

“Financial advisers are burdened by increased costs due to the RDR, however, they are yet to embrace the power of online tools to engage with larger numbers of consumers and make efficiency savings.”

October 2013

Share Dealing - UK

“A lack of financial education has caused many consumers to lack the confidence to make financial decisions. Many see shares as high-risk financial products that are beyond their understanding. With interest rates expected to remain low for the foreseeable future, these consumers are losing money due to the impact of ...