

# THE RE-ARCHITECTING OF BUSINESS: SPOTLIGHT ON FINANCIAL SERVICES

The Bureau of Labor Statistics predicts that the job category of Financial Managers will have significant growth between today and 2026, adding nearly 110,000 new jobs. At the same time, predictions for that job suggest that much of the job's daily tedium will be given over to machine intelligence – artificial intelligence, big data, robotics, and natural language processing. This begs the questions: *What will the financial services professionals of the future do? What will their days look like? How will they serve clients?*

To further complicate the matter, how will customer demands change in the future? Will they want more or less of their financial services professional's time? Will they expect financial management to be automated? If so, what services will they expect from their financial professional? What will clients be willing to pay for?

Perhaps a good metaphor for Financial Services is the evolution of the tollway. Early on, the driver stopped and handed the attendant money, took their change, and continued on. Then came the toll basket where the driver slowed enough to toss in the correct change. There was an attendant for those who needed specific help. Then the bar code on the car window or the remote device allowed drivers to hardly slow down yet one lane was still manned for those who needed help. Today many tollways photograph the car's license plate and send a bill to the driver. No attendants. No lines. No reason to tap the brakes.

## **Financial Services + Machine Intelligence + Changing Customer Demands = ???**

Are financial services on the same trajectory? Are customers going to be willing to "tap the brakes" to get help from a financial services professional? Or are they going to want to continue forward, fast?

***"Hey, Siri. Rebalance my portfolio to a 60/40 split of stocks and bonds. And only use ETFs."***

Learn where Cam's research and findings indicate that it's all leading and how you can prepare so that you'll be ahead of the changes and ready for your customer of the future.



Cam Marston, acclaimed author, columnist, blogger, and lecturer, is the leading expert on the impact of generational change and its effect on the marketplace.

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