



Financial Institutions Research Series

Fee-Based Financial Advisors (RIAs):
The Fastest Growing Financial Services Market & Distribution Channel

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- Data & Research Services

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- Financial Advisor Workstations

 - Evolution of Financial Advisor Workstations
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- Turnkey Asset Management Programs (TAMPs) & Outsourcing Trends

 - Turnkey Asset Management Programs (TAMPs)
 - Separately Managed Accounts
 - Outsourcing Trends

Fee-Based Financial Advisors (RIAs) Future Predictions

Moderate Growth in the Number of Fee-Based Financial Advisors (RIAs) & Rapid Growth in their Assets Under Management

- Fee-Based Financial Advisors
- Fee-Based Financial Advisors Partners
- Fee-Based Financial Advisors Employees
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Continuing Central Role of Custodians, Including those Beyond the Big Four

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 Growing Use of Exchange Traded Funds (ETFs), Alternative Investments, &
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 Continuing Search for the Technology Holy Grail
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