



TIBURON STRATEGIC ADVISORS

Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (and Related FinTech) Firms

Wealth & Investment Management Technology & Outsourcing Strategies: Client Relationship Management, Financial Planning, & Portfolio Accounting Solutions Driving an Increasingly Sophisticated Technology Stack

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 FA Turnkey Asset Management Programs (FA Product TAMPs) & Model Marketplaces Market Evolution

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 Investment Management Solution for Independent Advisors

 Fee-Based Financial Advisors Core Technology Component

 Institutional Client Demand to Supervise Financial Advisors & Capture Margins

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 FA Product TAMPs Phase.....

 FA Platform TAMPs Phase.....

 Model Marketplaces Phase

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	Employees

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Financial Advisor Clients	
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Trade Order Management Systems.....	
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Institutional Custodians	
Performance Management & Attribution Systems	
Client Reporting Systems	
Fund Accountants	
Managed Account Systems	
Transfer Agents.....	
Trade Order Management Systems.....	
Prime Brokers	
Institutional Custodians	

Performance Management & Attribution Systems	
Client Reporting Systems	
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Substantial Growth in Investment Management Technology	
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Fastest Growth in Institutional Custodians	
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Net Profits	
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Market Definition	
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Lending Technologies	
Payments Technologies	
Brokerage & Trust Technologies	
Client Service Technologies	
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Deposit Technologies	
Lending Technologies	
Payments Technologies	
Brokerage & Trust Technologies	

Client Service Technologies	
Infrastructure Technologies	
Banking Technology Future Predictions	
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Fastest Growth in Lending Technology	
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Firms by Market Segment.....	
Users by Market Segment	
Institutional Clients by Market Segment	
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Life & Health Insurance Technologies	
Property & Casualty Insurance Technologies.....	
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- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
- Net Profits.....
- Fastest Growth in Life Insurance Technology.....
- Firms by Market Segment.....
- Employees by Market Segment
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- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) by Market Segment
- Net Profits by Market Segment

**Wealth & Investment Management Technology & Outsourcing Strategies
Future Predictions**

- Substantial Growth in Wealth & Investment Management Technology & Outsourcing Strategies.....
- Wealth & Investment Management Technology & Outsourcing Strategies Firms.....
- Employees.....
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- Users
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- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA).....
- Net Profits.....
- Fastest Growth in Wealth Management Technology & Outsourcing Strategies (WealthTech).....
- Employees by Market Segment
- Institutional Clients by Market Segment
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- Revenues by Market Segment.....
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) by Market Segment
- Net Profits by Market Segment
- Continual Substantial WealthTech Venture Capital
- Financial Advisor Technology (B2B).....
- Market Growth.....
- Firms.....
- Funds.....
- Assets Raised
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- Cumulative Investments
- Invested Capital
- Cumulative Invested Capital.....
- Assets Under Management.....
- Portfolio Companies.....
- Dry Powder

- Leading Financial Advisor Technology (B2B) Venture Capital Investments
 - Capital Raised.....
 - Cumulative Capital Raised
 - Private Valuations
 - Peak Private Valuations
- Leading Financial Advisor Technology (B2B) Venture Capital Investors.....
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 - Assets Raised
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 - Cumulative Investments
 - Invested Capital
 - Cumulative Invested Capital.....
 - Assets Under Management.....
 - Portfolio Companies.....
 - Dry Powder
 - Market Segments
 - Market Definition
 - TAMPs (Platforms).....
 - Single Point Solutions
- Financial Advisor Technology (B2B) Venture Capital Future Predictions
 - Substantial Growth in Financial Advisor Technology (B2B) Venture Capital.....
 - Firms
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 - Assets Raised
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 - Cumulative Investments
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 - Fastest Growth in TAMPs (Platforms)
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 - Funds by Market Segment.....
 - Assets Raised by Market Segment.....
 - Investments by Market Segment
 - Cumulative Investments by Market Segment.....
 - Invested Capital by Market Segment
 - Cumulative Invested Capital by Market Segment.....
 - Assets Under Management by Market Segment.....
 - Portfolio Companies by Market Segment.....
 - Dry Powder by Market Segment
- Improved Integration and Fastest Growth in FA Client Relationship Management Systems, FA Account Aggregation & Financial Planning Technology, and FA Portfolio Accounting & Reporting Technology (FA Platform TAMPs), with these Firms Becoming the Defacto Platforms and Other Single Point Solutions Struggling to Survive
 - Improved Integration of Various Financial Advisor Technology Components.....
 - CRM Platforms.....
 - Financial Planning Technology Companies.....
 - Fee-Based Financial Advisor Custodians

Platform TAMPs	
Financial Advisor Workstations	
Firms by Market Segment.....	
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Increasing Importance of Mobile Technology, Client-Facing Collaborative Technology, & Virtual Delivery	
Mobile Technology	
Sub-Future Prediction #1	
Sub-Future Prediction #2	
Client-Facing Collaborative Technology	
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Virtual Platforms	
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Financial Advisor Online Meeting Applications	
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Continued Expansion of Investment Management Firms (as well as Custodians & Broker/Dealers) into Delivering Investment Management, Financial Advice, & Business Management Technology Products	
Strategic Assessment & Opportunity	
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- Users
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- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
- Net Profits
- Market Segments
- Market Definition
- Market Segment #1
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- Cyber Security Future Predictions
- Substantial Growth in Cyber Security
- Cyber Security Firms
- Employees.....
- Institutional Clients.....
- Users
- Revenues
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
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- Future Prediction #2.....
- Sub-Future Prediction #1
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- Robotic Process Automation (RPA)
- Market History
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- Market Growth.....
- Robotic Process Automation (RPA)Firms.....
- Employees
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- Revenues.....
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
- Net Profits
- Leading Robotic Process Automation (RPA)Companies
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- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
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- Market Segments
- Market Definition
- Reconciliation
- Online Chat.....
- Reconciliation.....
- Online Chat.....
- Robotic Process Automation (RPA) Future Predictions
- Substantial Growth in Robotic Process Automation (RPA)

Employees.....	
Institutional Clients.....	
Users	
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Employees by Market Segment	
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Net Profits by Market Segment	
Emergence of Third-Party Development of Leading-Edge Modules & B2C Solutions, Often Leveraging Application Programming Interfaces (APIs) and Artificial Intelligence & Machine Learning (AI & ML)	
Artificial Intelligence & Machine Learning (AI & ML).....	
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Emergence Phase.....	
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Artificial Intelligence Programming	
Other Artificial Intelligence Fields	
Artificial Intelligence Related Software	
Expert Systems.....	
Natural Language	
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Artificial Intelligence Programming	

- Other Artificial Intelligence Fields
- Intelligence & Machine Learning (AI & ML) Future Predictions
- Substantial Growth in Intelligence & Machine Learning (AI & ML)
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- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)
- Net Profits.....
- Fastest Growth in Artificial Intelligence Related Software.....
- Employees by Market Segment
- Institutional Clients by Market Segment
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- Revenues by Market Segment.....
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) by Market Segment.....
- Net Profits by Market Segment
- Huge But More Mid-Term Potential in Blockchain Technology
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- Middle Phase.....
- Recent Phase.....
- Market Growth.....
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- Revenues
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA).....
- Net Profits
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- Employees.....
- Institutional Clients
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- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA).....
- Net Profits
- Market Segments
- Market Definition.....
- Market Segment #1
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- Blockchain Technology Future Predictions
- Moderate Growth in Blockchain Technology.....
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- Institutional Clients
- Users
- Revenues.....
- Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) ..
- Net Profits
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Sub-Future Prediction #1
Sub-Future Prediction #2
Continual Substantial WealthTech Mergers & Acquisitions.....
Sub-Future Prediction #1
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Wave.....
Sub-Future Prediction #1
Sub-Future Prediction #2