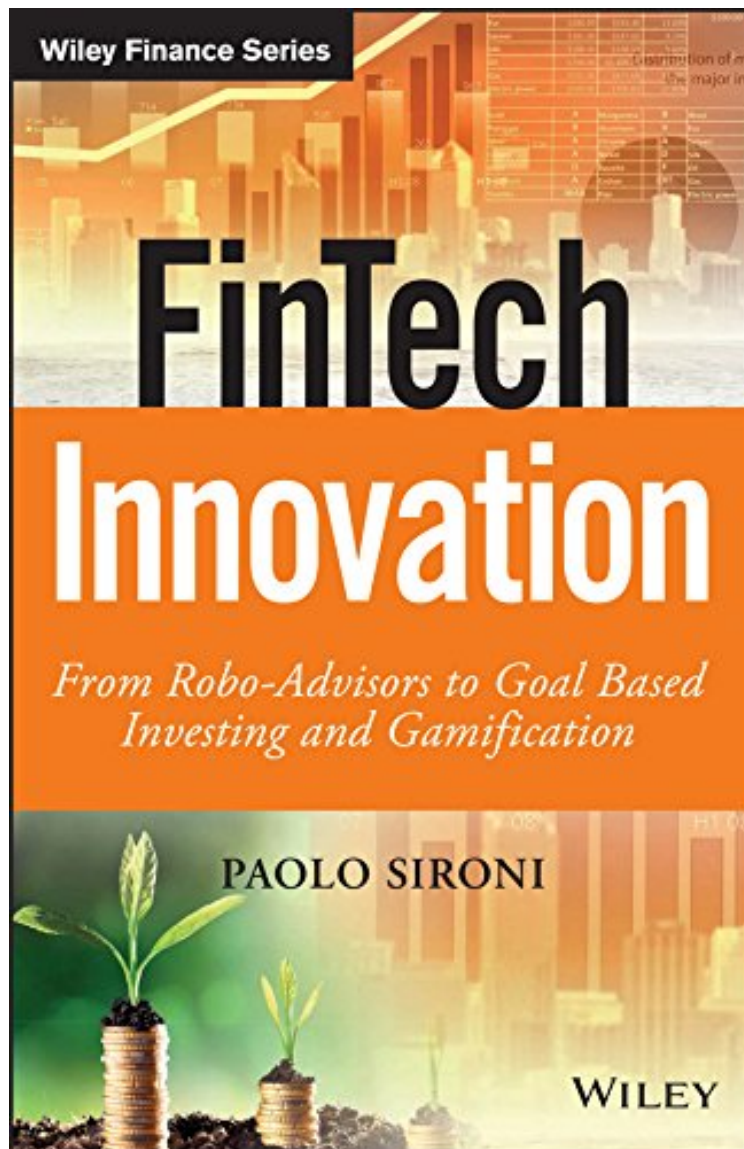


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FinTech Innovation: From Robo-Advisors to Goal Based Investing and Gamification (The Wiley Finance Series)

Paolo Sironi

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Paolo Sironi : FinTech Innovation: From Robo-Advisors to Goal Based Investing and Gamification (The Wiley Finance Series) before purchasing it in order to gage whether or not it would be worth my time, and all praised FinTech Innovation: From Robo-Advisors to Goal Based Investing and Gamification (The Wiley Finance Series):

3 of 5 people found the following review helpful. Overpriced brochure.By Justin BieberNothing new. All of this info

(speculation really) is free on the internet. Would not recommend. 1 of 1 people found the following review helpful. A good book but it didn't impress me. By Fred Zhikang Yu I am enlightened by a few points the author made in this book, such as the potential of robo-technology disintermediate ETF providers, gamification for educational purpose, and the author's in-depth coverage on goal based investing. However, I still find most of the contents in this book very familiar to me already. Another thing I like less is that certain views are expressed repeatedly in this book and the wording is not concise enough, so certain parts did not quite engage me. This is a good book for people who don't know much about robo-technology in investment and want to get an overview, but it may seem less helpful to those who already have some knowledge of robo-technology. 7 of 9 people found the following review helpful. Everything you need to know about FinTech innovation and Robo-advisory. By Jerry Floros The author goes into great detail explaining all there is to know about Robo-Advisory and the future of digital wealth management. To clarify the points made, there are many graphs and illustrations throughout the book and for those who are interested, there are many mathematical formulas detailing various theories relating to "goal based investing" and portfolio balancing. The most interesting observation made by the author is that wealth management has progressed from the exclusive advisory for the select few UHNW (ultra-high-net-worth), to discount and online brokerage for the mass affluent and now digital wealth management comprising all investors from UHNW, mass-affluent as well as the average retail investor. The book is very well structured, details all the intricate aspects of digital wealth management and also gives the reader a glimpse into the future of FinTech and Robo-Advisory. Highly recommended reading for anyone interested in the future of digital investing and personal wealth management.

A survival guide for the FinTech era of banking FinTech Innovation examines the rise of financial technology and its growing impact on the global banking industry. Wealth managers are standing at the epicenter of a tectonic shift, as the balance of power between offering and demand undergoes a dramatic upheaval. Regulators are pushing toward a 'constrained offering' norm while private clients and independent advisors demand a more proactive role; practitioners need examine this banking evolution in detail to understand the mechanisms at work. This book presents analysis of the current shift and offers clear insight into what happens when established economic interests collide with social transformation. Business models are changing in profound ways, and the impact reaches further than many expect; the democratization of banking is revolutionizing the wealth management industry toward more efficient and client-centric advisory processes, and keeping pace with these changes has become a survival skill for financial advisors around the world. Social media, big data analytics and digital technology are disrupting the banking industry, which many have taken for granted as set in stone. This book shatters that assumption by illustrating the massive changes already underway, and provides thought leader insight into the changes yet to come. Examine the depth and breadth of financial technology Learn how regulations are driving changing business models Discover why investors may become the price-makers Understand the forces at work behind the rise of FinTech Information asymmetry has dominated the banking industry for centuries, keeping the bank/investor liability neatly aligned; but this is changing, and understanding and preparing for the repercussions must be a top priority for wealth managers everywhere. Financial Innovation shows you where the bar is being re-set and gives you the insight you need to keep up.

"...the only book you need right now on the subject of robo-investment." (QA Financial, September 2016) From the Inside Flap Innovation in financial technology has only begun to disrupt the wealth management industry, and is leading to a tectonic shift whereby investors and tech-savvy financial advisors can become the new price-makers in the global democratization of banking. FinTech Innovation delves deep beyond simply describing the disruption examining, in detail, the underlying processes to illuminate exactly what is happening and why it's happening so that you can engage with and thrive in the new marketplace. Through a behind-the-scenes look at Robo-Advisors and their part in the turnkey, low-cost personalization of Goal Based Investing, this cutting-edge guide opens a tangible path for using technology to gain a competitive advantage, establish your value as a human advisor and "rewire" investors' minds to positively engage with investing. If you want to implement efficient, personalized investing, you want FinTech Innovation at your side. This authoritative guide from a global expert on quantitative financial analysis and digital technology pulls back the curtain to reveal: What Robo-Advisors are today and how they will evolve How human financial advisors can optimize their businesses in response to regulations, customer demand and technology What gamification has to do with investing, and why it can produce better investors Where you need to rethink what you know about investing and let technology do the work. From the Back Cover Praise for FinTech Innovation "The wealth management industry is being redefined as we speak. While robo-advice will drastically change how financial institutions serve mass-affluent clients, goals-based wealth management is becoming the golden standard for high-net-worth firms. Paolo Sironi's book provides a holistic and comprehensive look at these complex industry changes." —Alois Pirker, Research Director, Aite Group "FinTech Innovation is a FinTech survival guide for anybody who manages, invests or saves money. Disruption in Asset Management is coming fast and this book highlights how to benefit from innovation such as Robo-Advisory and Goal Based Investing. This is a must-read book by Paolo Sironi, a

global FinTech Thought Leader!" —Susanne Chishti, CEO, FINTECH Circle; Chairman, FINTECH Circle Innovate; Co-Editor, The FINTECH Book "This is a thoughtful and superbly executed look at how financial technology has brought welcome changes to the world of investment management. This is essential reading not only for next generation investors but all investors who want to fully understand how money — their money — will be managed going forward." —Mark Landis, Founding Partner, Wavelength Capital Management LLC "Paolo Sironi succinctly captures FinTech's role in the escalating disintermediation of the Wealth Management industry, while offering a logical rationale for what may lie directly ahead. The convergence of investment advice and planning via potential real-life simulations will create a new path for Global Wealth Managers. Goal Based Investing may very well offer regulatory and revenue solutions for a rapidly changing industry." —Mark Cipollina, Executive Director, Head of Investment Advisory UK, Standard Chartered Bank "This book presents a bold new vision on Fintech and Goal Based Investing! Just in time for the largest wealth transfer in history. Goal Based Investing and FinTech solutions are in the minds of every millennial and baby boomer who is millennially-minded." —April Rudin, CEO/Founder, The Rudin Group "It's simple. If you want to know what the future holds for wealth management, ask Paolo Sironi. His latest book presents a personal vision of financial advice that all market participants must heed to stay relevant, and ultimately to stay in business." —Aki Ranin, FinTech blogger and Entrepreneur