

Wealth management business leaders face unique challenges. Our Wealth Management Executive Council is a members-only forum to create opportunities for peer-to-peer networking, proprietary research, and best practices benchmarking.

About the Council

The Datos Insights Wealth Management Executive Council is a free, moderated, knowledge-sharing group for heads of business, product, sales, technology, operations, and strategy at wealth management firms.

Discussion and research topics are driven by Council members; members receive complimentary copies of all research they contribute to.

Who Can Participate?

Membership is open to any senior leader who owns one or more functions within the product, sales, strategy, or operations divisions of a wealth management firm.

Membership is not limited to Datos Insights clients. The Council is not open to any vendors or service providers.

Members will initially represent firms with either 500+ advisors or with more than US\$20 billion AUM.

Executive Council members enjoy benefits such as:

- Complimentary access to select reports
- Invitations to participate in relevant executive research
- Conversations with other Executive Council members on topics of common interest

About Membership

Membership in the Wealth Management Executive Council includes:

- **Quarterly Meetings**

Each meeting focuses on a set of topics relevant to Council members, including regulatory impacts, production innovation, advisor enablement, holistic advice delivery, technology trends, strategic opportunities, and other topics of interest as designated by the members.

Outside speakers may be invited with consensus of members.

- **Regular Community-Based Studies**

At each meeting, Datos Insights will facilitate interactive discussions of research findings primarily drawn from surveys of—and conversations with—senior executives in the Executive Council as well as our own proprietary research.

Members will also have access to excerpts from some of Datos Insights' Wealth Management subscription-based research.

- **In-Person Networking Event**

An annual in-person networking event will be held exclusively for Council members in conjunction with Datos Insights' annual Wealth Management Forum. Council members will receive a complimentary pass to attend the Forum.

In exchange, we ask that members attend and actively participate in at least two meetings per year and complete four annual online surveys (designed to take less than 10-15 minutes to complete).