

TOP 5 FINANCIAL PLANNING TRENDS IN 2021

1



Adoption of New technology

Digital wallets are becoming the new mode of tap-and-go consumerism which has made transactions simpler, faster, secure, and transparent.



Increased longevity needs more financial planning

The global life expectancy has been increasing at a steady rate and implies that we need to do some meticulous financial planning.

2

3



Growth in workforce diversity

While the financial services industry has been traditional, they are gradually modifying processes to become more women-friendly.



Increased Focus on the Customer

Advisors need to brace themselves by spending more time meeting their clients, and understanding their unique challenges and goals.

4

5



Increase in the value of certain stocks

With the success of the vaccination drive in the US, industries such as pharma, airlines, and hotels might be in focus along with others that were neglected in 2020.