Gibson STRATEGY

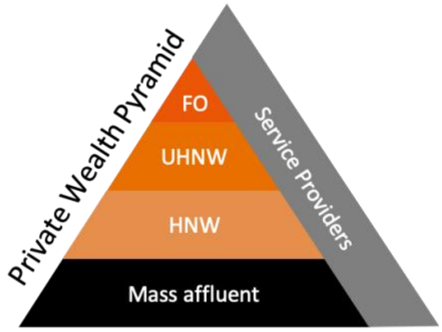
Influencing better wealth creation

Research

Education

Consulting

Private wealth global research reports



→ Deep independent, panoptic academic research

→ 500+ interviews with private clients

→ 500+ interviews with key decision makers within private wealth management

→ Across 24 global jurisdictions

→ Electronically distributed to 20,000+ international private wealth professionals and private clients

Sponsorship Benefits:

Significant brand exposure amongst international private clients, family offices, private wealth professionals and intermediaries/introducers, which includes advert in the published research paper and on all associated promotional communications

Podcast interview to promote sponsor's brand and proposition distributed via social media network

Brand association with a high-quality academic qualitative and quantitative research study

Feedback from Dr Stuart Gibson on data gathered for the report

10% discount at Gibson Strategy's Masterclasses and online learning programme

Exclusive invite

- to **two launch events**; an **exclusive private client event** and an **industry event**

Gibson Strategy are delighted to announce the 2021 series of academic research on the global private wealth sector.

This sequence of research reports will exhibit data gathered from comprehensive interviews with multi and single-family offices, UHNW, HNW and private wealth professionals.

Topics covered:

- Private client's selection criteria for wealth professionals and service providers and client acquisition strategy.
- Communication, relationships, value, service quality, satisfaction, trust, loyalty and client retention.
- Private client services such as private banking, investment management, trust & corporate services, family office services, legal services, tax services and real estate.
- Family offices, succession planning & next generation, substance, sustainable investing, philanthropy, privacy, security and the global citizen.
- Private wealth portfolios which include investments, collectibles, real estate, private equity, co-investing, lending, technology, social impact investing, technology, private jets, private yachts and private client insurance.
- Private wealth client and key service provider decision makers views on the future of the private wealth sector and future global trends.

The key findings will be presented at the launch events in the country of study, with an exclusive audience of high value private clients and private wealth professionals.

Gibson Strategy

Our independent, panoptic insight across private wealth successfully influences corporate strategy within private wealth.

We offer a range of services which draw on source data gathered from deep academic research that we conduct revealing current trends, themes and thought-leadership crucial for developing future corporate strategy for your private clients.

Dr Stuart Gibson, PhD MSc DipM FCIM FCMI, is an expert in empirical research and business strategy within private wealth management. He has spent 38+ years working and collaborating with financial organisations, family-offices, UHNWs and HNWs across the globe.

Services

Deep empirical research is our foundation from which we offer an array of services that are complimentary to wealth management businesses.

Research | Education | Consulting

For further details email Dr Stuart Gibson
stuart@gibsonstrategy.com

Research focus 2021

- **Jersey**
- **Africa**
  (South Africa, Kenya and Nigeria)
- **Middle East**
  (UAE, Saudi Arabia, Kuwait, Qatar, Oman and Bahrain)
- **UK**

"The extensive research studies into the emotional behaviours of UHNWs and family office strategy by Dr Stuart Gibson are incredibly insightful. I have known Dr Gibson for a number of years as a university lecturer colleague and at GPFO we are very pleased to be working with Dr Gibson on a number of major research studies into family offices."

Dr Michael Oliver, Global Partnership Family Offices

Research

Private wealth reports

- Build brand awareness and value
- Issued to 20,000+ private wealth professionals
- Issued to 1,000+ private wealth clients

Bespoke research

- Client-led, project focussed
- White-labelled research thought-pieces

Education

Masterclass workshop – focussed learning

- Current practice and approach
- Future themes and trends
- Key private wealth speakers
- Networking

Online learning programme

- Online modules
- Current practice and approach
- Future themes and trends

Consulting

Complex or single topic project

- Collaborative approach
- In-house research symposium included
- Retainer or bespoke arrangement