

A photograph of the Aurora Borealis (Northern Lights) over a snowy, rocky landscape. The sky is dark and filled with stars, with the aurora displaying vibrant green and purple hues. The foreground shows a dark, snow-covered ground with some rocks.

Evolving Attitudes to Wealth

A Next-Gen Perspective

The Panel



Matthew Gilligan

Moderator

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Chair



Lily Simmons

Panellist

Saffery Trust



Hawkins

Panellist

Mourant



Gervaise-Brazier

Panellist

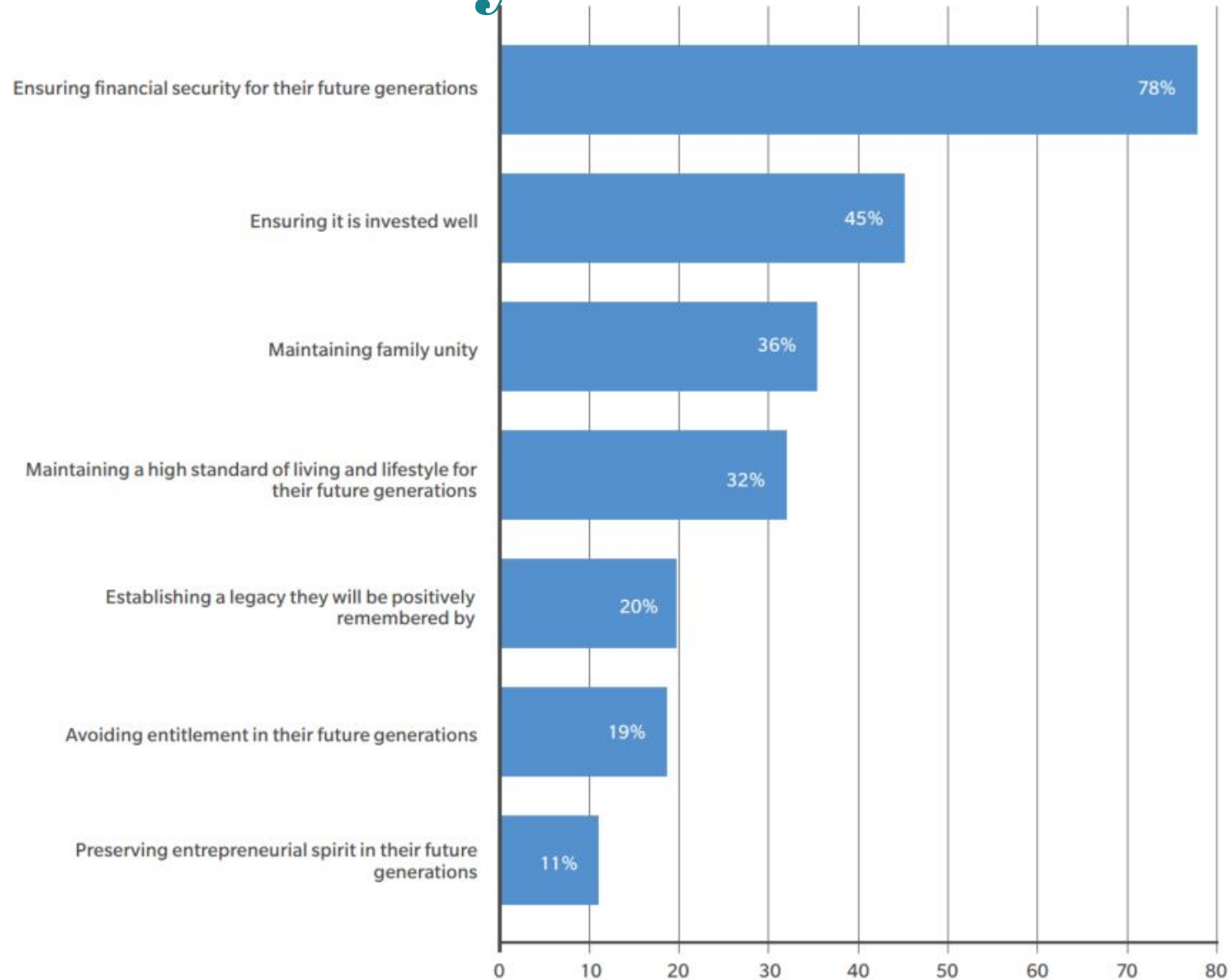
Rathbones

1st Slido Poll:

What do clients most commonly raise with you about their current objectives for their wealth?



STEP 2025 Survey Results



The Great Transfer of Wealth



2nd Slido Poll:

What do you think will be the biggest concern/issue for the Next Generation of Clients?

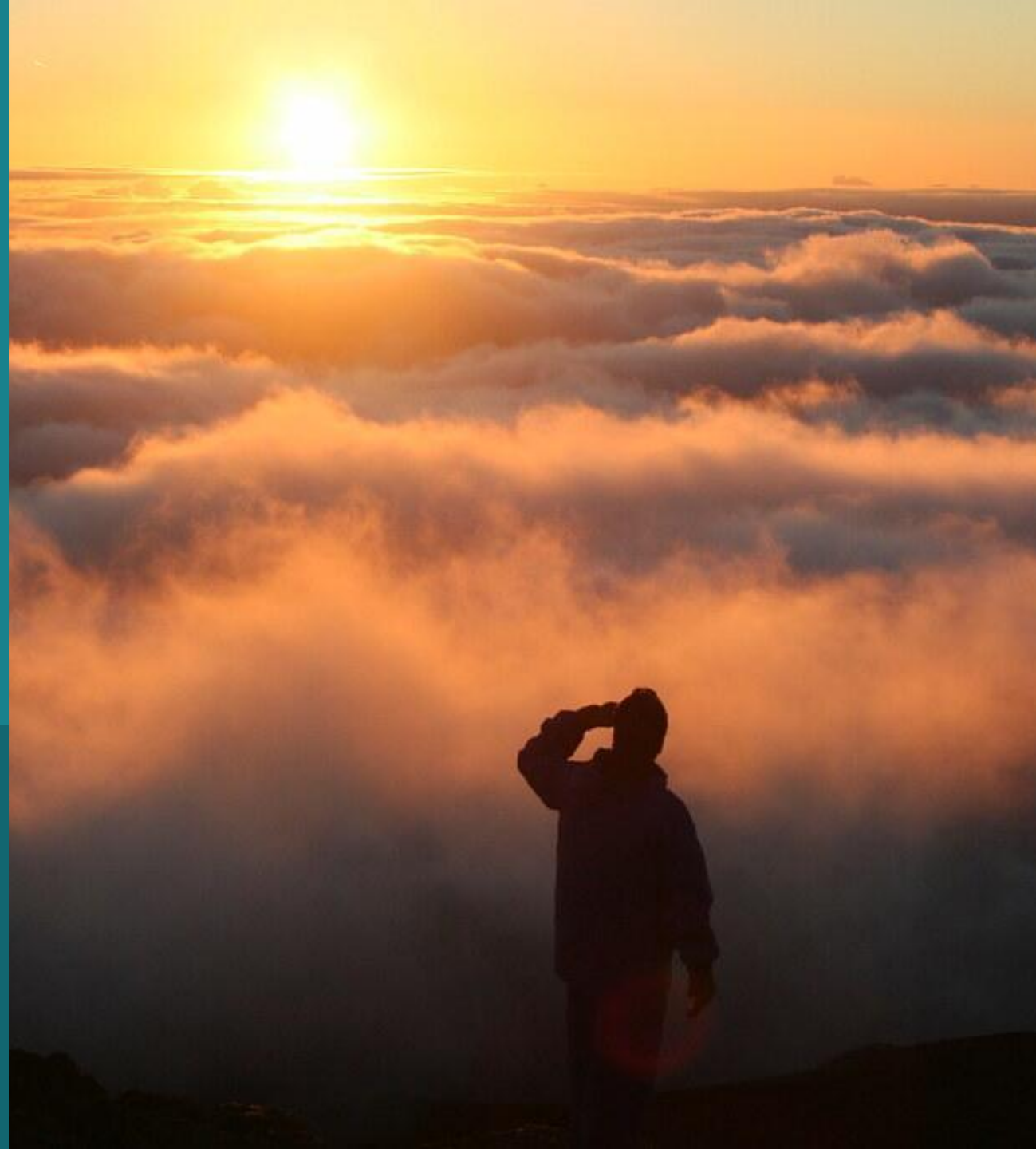




Results

3rd Slido Poll:

What do you think will be the biggest impact on our industry over the next 10 years?





Results

Summary and Take Away Points





Thank You