



Understand your position

Wealth Management Pricing Survey 2017

With high competitive pressure coming from the market, along with regulatory developments changing remuneration models and wealth management, pricing has become one of the strategic priorities for wealth management executives. While pricing references exist, they are often lacking, which makes it harder for you to make informed decisions.



Proposition

In this context, Deloitte is introducing its 2017 Wealth Management Pricing Survey, where we explore trends in pricing for wealth management services in Luxembourg, and trends in markets served by Luxembourg Wealth Management players.

We also look into pricing dynamics across client segments and key lines of products offered in the market.

What's in it for you

- By participating in the survey, you will be able to:
 - Better understand your pricing position vs. the Luxembourg Wealth Management market
 - Identify areas of under/over pricing vs. the market in key client segments
 - Understand the adoption and pricing dynamics of post-MiFID II offerings
 - Obtain an objective basis on which to ground your commercial strategy
- Contributing to our survey grants participants with a free-of-charge benchmarking pack, highlighting your company's position vs. the market

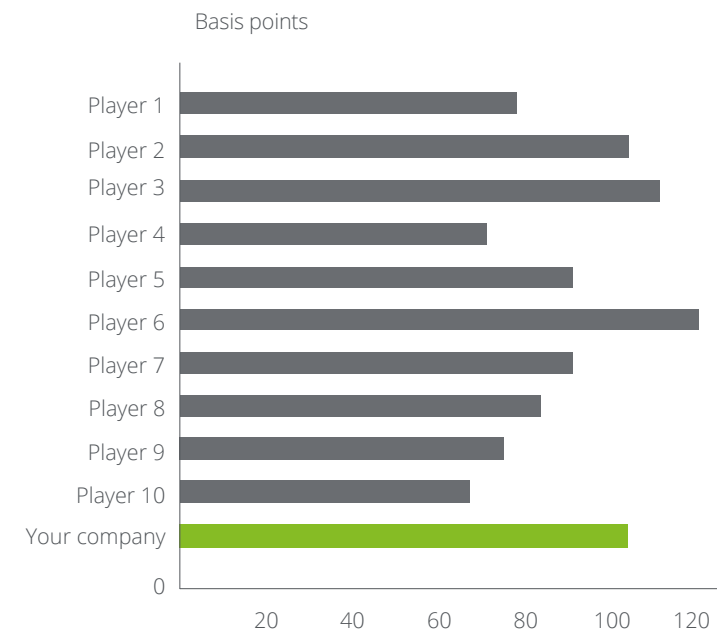
Get in touch

- To participate, we invite you to liaise with our pricing team and schedule a briefing meeting
- Participation is free-of-charge
- Deloitte will provide resources to help you gather relevant pricing data, as required

Examples of analyses to be included in your benchmarking report (not exhaustive)

RoA benchmarking report: overall pricing levels and differences by market

Overall RoA benchmarking



How do my overall pricing levels compare with those of other Luxembourg and international private banks?

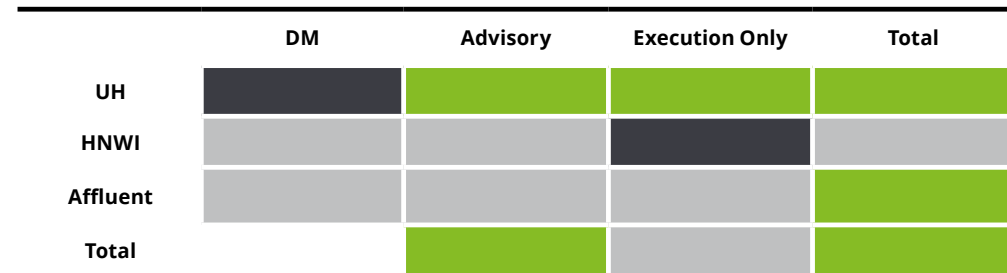
RoA benchmarking by market



How is my pricing for international markets aligned with international providers serving these markets?

RoA benchmarking report: pricing heatmap by segment and contract type

Heatmap of RoA over / under-performance vs. market

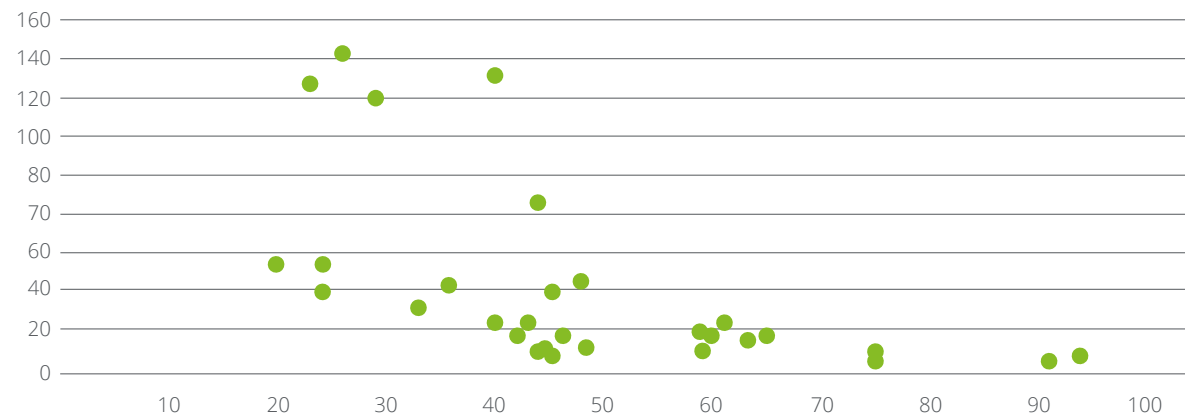


■ Your company above market ■ Your company in line with market ■ Your company below market

How does my pricing by client segment and by contract type compare vs. market practice?

Pricing by client size and segment

Average portfolio size RoA



How balanced is my client portfolio between mandate size and revenue generated?

Deloitte Luxembourg offers a unique advisory value proposition to the Wealth Management industry

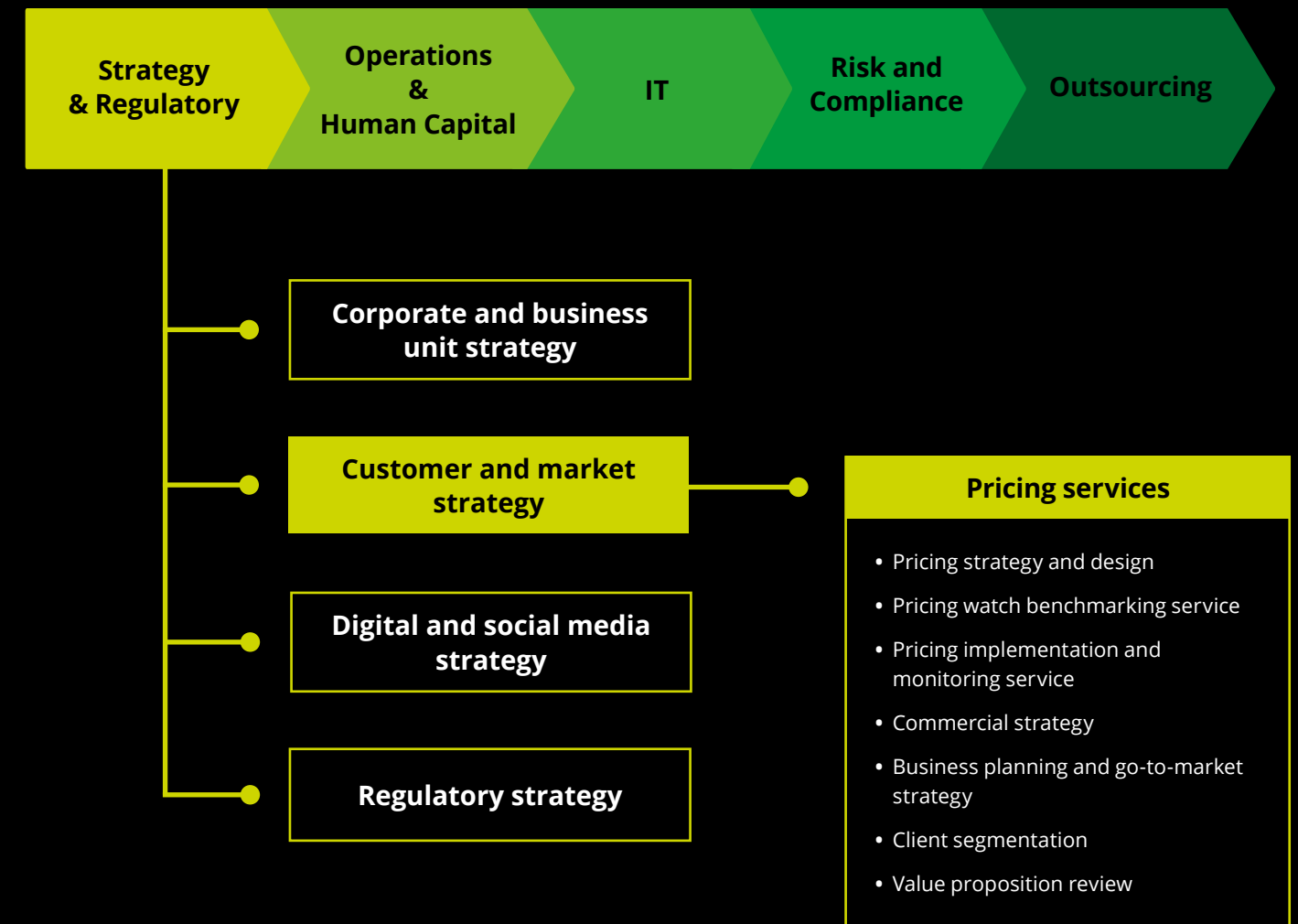
We combine deep industry expertise and a broad range of services, from strategy definition to operational design and implementation support.

We serve players across the value chain including front, middle and back-office aspects.

Our team comprises both industry experts with significant industry experience, and functional experts in the different areas we cover including Strategy, Regulatory, Operations, Human Capital, Technology, Risk and Compliance.

Deloitte Luxembourg capabilities in Wealth Management

We offer a broad range of advisory services to support your business.



Contacts

**Benjamin Collette**

Partner – Financial Services Industry
Consulting Leader
+352 451 452 809
bcollette@deloitte.lu

**Francois Gilles**

Director – Strategy, Regulatory
& Corporate Finance
+352 451 453 751
fgilles@deloitte.lu

**Pascal Martino**

Partner – Consulting
Banking Leader
+352 451 452 119
pamartino@deloitte.lu

**Carlo Duprel**

Director - Strategy Regulatory
& Corporate Finance
+352451453001
cduprel@deloitte.lu

**Marco Lichtfous**

Partner - Advisory & Consulting
+352 45145 4876
mlichtfous@deloitte.lu

**Julien Schaffner**

Director - Operations Excellence
& Human Capital
+352 45145 3472
jschaffner@deloitte.lu

**Patrick Laurent**

Partner - Technology
& Enterprise Application
+352 45145 4170
palaurent@deloitte.lu

**Xavier Turquin**

Senior Manager - Strategy Regulatory
& Corporate Finance
+352 45145 4229
xturquin@deloitte.lu

**Ronan Vander Elst**

Partner - Technology
& Enterprise Application
+352 45145 4322
rvanderelst@deloitte.lu

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