



# Motive Partners Unveils 2025 Wealth Vision at Davos

Private equity leader exclusively specialized in fintech outlines catalysts driving transformation in wealth management

**New York, January 23, 2025** – Motive Partners (“Motive”), a specialist private equity firm exclusively focused on financial technology, released today a new paper titled [Masterminding the Wealth Management Transformation](#), providing insights on industry trends expected to drive significant innovation and growth in wealth management. The paper outlines Motive’s strategic wealth vision for 2025, the firm’s ecosystem economics approach to capitalizing on market opportunities to create a leading private equity network of wealth. Motive’s portfolio companies support clients that represent more than an estimated \$12 trillion of assets, operating across the full wealth management lifecycle from product manufacturing to distribution.

Members of the Motive executive team are joining other global economic and business leaders this week at the World Economic Forum Annual Meeting in Davos, Switzerland to discuss these trends, insights and investments in specialty companies where the firm is strategically connecting industry-leading capabilities across its portfolio, designed to capitalize on market opportunities in ways that distinguish the firm from other private equity firms.

Motive’s strategic wealth vision is structured into four transformative phases, driven by dynamic growth in areas like alternative asset management and AI:

#### **Phase 1: digitization of alternatives**

With alternative investments growing in popularity and accessibility, advisors need a digital-first model to work smarter and more efficiently. In this first phase of innovation, API integration connects alternative asset data across custodians, distributors and trading platforms, enabling private market securities to coexist seamlessly with traditional assets. Operational portals are also expected to emerge as critical tools in this phase, providing alternative asset managers with enhanced capabilities to process transactions efficiently.



### Phase 2: multi-asset integration

In this phase, advisors are expected to gain access to enhanced tools for scenario modelling, tax optimization, and risk assessment, allowing for better oversight of their clients' whole financial wellbeing. AI algorithms will support portfolio rebalancing by dynamically analyzing asset performance and adjusting allocations to reflect changes in market conditions.

### Phase 3: AI-augmented advisory and investor superpowers

Hyper-personalization and interactive experiences will advance client expectations. AI will enable investors to model scenarios, understand risk implications, and receive tailored advice on portfolio adjustments. Additionally, these tools will enhance advisor productivity by providing aggregated views of client portfolios, investment trends, and key performance metrics. By combining machine intelligence with human expertise, wealth managers are anticipated to be able to deliver strong value and drive increased client engagement.

### Phase 4: modular and headless SaaS platforms

The final phase envisions the evolution of wealth management into a modular, headless SaaS platform, ensuring scalability and flexibility by decoupling core functionalities in favor of API models and cloud enablement. By transforming wealth technology into an open, interoperable platform, this phase is expected to set the stage for continuous innovation and long-term success.

The Masterminding the Wealth Management Transformation paper delves deeper into new developments across Motive's portfolio of companies and how each is contributing to the firm's strategic vision, including:

- **BetaNXT** provides advanced post-trade processing and tax reporting solutions, strengthening back-office and middle-office operations
- **CAIS** enhances access to private markets through its marketplace and processing engine, aligning with the democratization of alternatives
- **FNZ** supports front-office and middle-office capabilities through its integrated wealth management platform, enabling seamless client experiences and robust portfolio management
- **InvestCloud** powers the largest managed accounts platform and cracked the code on private markets investments, and creates differentiated advisor experiences with its leading-edge technology for personalization and scalability
- **Wilshire** delivers investment solutions, analytics, and benchmarks that empower wealth managers to make informed, data-driven decisions

For more information and to download the full paper, visit [our website](#).

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### About Motive's partnership with World Economic Forum

Motive Partners is a Partner of the World Economic Forum and member of the Forum's Private Investors industry. The firm's Founder and Managing Partner Rob Heyvaert has led Motive's delegation at the Annual Meeting in Davos for the past decade, with additional Partners representing the firm across the Forum's various strategic program initiatives throughout the year. Motive Partners is formally engaged in the Forum's Centers for Financial and Monetary Systems and the Fourth Industrial Revolution, as well as the International Business Council, the Future of Capital Markets Steering Committee, and Future of Global Fintech initiatives.



Earlier this week, the World Economic Forum published its white paper: Artificial Intelligence | Transforming Financial Services, for which Motive Partners was a key content contributor and collaborator. The paper explores the digitization of financial services – from ATMs to online banking and mobile apps – and its transformation of the industry from all stakeholder perspectives. AI is poised to have at least as profound an impact, albeit with important differences. Never before has the industry attempted to reinvent itself, its practices and its offerings so extensively at such a rapid pace. By promoting a better understanding of both the potential and the risks of the technology, this paper seeks to help build a foundation for the effective and responsible application of AI for the benefit of all. To download the white paper and learn more about this rapidly-developing technology: [Artificial Intelligence | Transforming Financial Services](#)

#### **About Motive Partners**

Motive Partners is a specialist private equity firm with offices in New York City, London, and Berlin, focusing on growth equity and buyout investments in technology-enabled financial and business services companies based in North America and Europe and serving five primary subsectors: Banking & Payments, Capital Markets, Data & Analytics, Insurance, and Wealth and Asset Management. Motive Partners brings differentiated expertise, connectivity, and capabilities to create long-term value in financial technology companies. More information on Motive Partners can be found at [www.motivepartners.com](http://www.motivepartners.com).

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