

NEWS

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The Oasis Group Launches Research Series Analyzing Custodian Platforms and Other Wealth Management Service Providers

Vantage Point Peaks provides in-depth reports and competitive analysis on a range of wealthtech service providers

MONROE TOWNSHIP, NJ (August 27, 2024) – [The Oasis Group](#), a leading consultancy for the wealth management industry, recently launched a new research series called [Vantage Point Peaks](#), which provides in-depth reports and competitive analysis on a range of service providers in the wealth management industry. The reports are designed to help wealth management firms become more informed buyers when breaking away or looking for new wealthtech solutions.

“We’re so excited to bring our new research series to the marketplace,” said John O’Connell, founder and CEO of The Oasis Group. “Vantage Point Peaks will give wealth management firms a leg up when determining which service providers are the right fit for their firm. This research will save firms significant time when generating their short list of custodian providers.”

The first study of the research series, available now, is the [Vantage Point Peaks for Custodian Platforms](#), which focuses on the registered investment adviser and broker-dealer custodian market and is available to RIA and BD executives, as well as family offices and private wealth firms, interested in new custodian relationships.

“Much of the existing research in the wealth management space is survey based. We are changing that with our Vantage Point Peaks research, which provides wealth management executives with an empirical analysis of the leading custodians, as well as an unbiased comparison of each custodian’s capabilities relative to others in the marketplace,” O’Connell added.

While the wealth management marketplace has several opinion-based research studies, The Oasis Group’s research is based on a comparison of the capabilities of each service provider as reported by the provider and their customers. O’Connell and his team worked directly with each custodian

to determine features, capabilities, strengths, weaknesses, and areas of improvement for each of the ten custodians featured in the study, analyzing their current product offering as well as their ability to execute.

The ten custodian platforms featured in the study include [Schwab](#), [Pershing](#), [Fidelity](#), [Altruist](#), [Apex Fintech Solutions](#), [Goldman Sachs](#), [TradePMR](#), [Hilltop Securities](#), [Innovayte](#), and [RBC Clearing & Custody](#).

Wealth management firms can [purchase the comprehensive Peaks Report](#), which contains over 30 pages of thoughtful research and includes the full custodian market definition and description, a chart positioning each custodian in terms of ‘Current Product Offering’ and ‘Ability to Execute’, and for each individual custodian, an executive summary and details on the firm’s background, market position, strengths, and improvement opportunities.

Also available for purchase are in-depth Peaks Individual Reports for each of the custodian platforms, ranging from 12 to 18 pages and featuring an executive summary, a company overview, product observations, strengths, and improvement opportunities. A free Peaks Summary report is also [available for download](#), featuring the Peaks Executive Summary and Research Process Summary, a market definition, the Vantage Point Peaks chart, and additional details on what’s included in the full report.

Future [Vantage Point Peaks](#) studies will focus on other wealthtech solutions and service providers available to wealth management firms, including portfolio management solutions, financial planning software, CRM solutions, and more.

To learn more about Vantage Point Peaks and to access the Custodian Platform research, including the free Peaks Summary report, [please click here](#). To purchase the comprehensive Peaks Report, as well as the Peaks Individual Reports for each custodian, [please click here](#).

THE OASIS GROUP RELEASES SECOND EDITION OF AI WEALTHTECH MAP

In addition, The Oasis Group recently released the second edition of their [AI WealthTech Map](#), a resource that financial advisors and wealth management firms can use to discover leading artificial intelligence solutions and AI-focused firms serving the wealth management industry. The firm plans to update the interactive map monthly so that wealth management firms are informed about all the latest and greatest AI solutions available to the industry.

For the August AI WealthTech Map, The Oasis Group identified 65 leading technology firms that specifically serve the financial services industry for inclusion in the map. The firms are not existing wealthtech solutions that are developing AI capabilities – these firms are AI first and were built to support the wealth management industry. The map follows the sales cycle of a wealth manager by starting with prospecting, followed by writing assistants, note takers, proposal generation, AI assistants, investment research, next best action, and compliance solutions – categorizing each of the solutions and providing all the tools that a financial advisor would need to convert a prospect into a client as efficiently as possible.

To access the latest AI WealthTech Map from The Oasis Group’s Vantage Point, [please click here](#).

ABOUT THE OASIS GROUP

The Oasis Group is a leading consultancy in the wealth management industry, helping wealth management and financial technology firms create and focus on their unique value proposition to attract advisors and clients, and ultimately generate higher revenue. The Oasis Group offers award-winning consulting services, industry-leading research, and compelling on-demand training for wealth management firms and the service providers who serve the wealth management industry. With extensive leadership experience in both emerging businesses and mature, established organizations, founder John O'Connell and his team are passionate about helping financial services and technology firms solve their most complex technology and sales challenges, helping clients stay focused on their growth, generate more revenue through great sales processes, build fantastic products by understanding the market and competition, and provide amazing service to their customers and clients. To learn more about The Oasis Group, visit www.TheOasisGrp.com.

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