Wealth Management

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Lecturer

ΟΙΚΟΝΟΜΙΚΟ ΠΑΝΕΠΙΣΤΗΜΙΟ ΑΘΗΝΩΝ
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What is Wealth?

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The Professional View

To us there are no foreign markets.™

Canaccord Genuity Wealth Management is a premier global, independent wealth management firm. We focus on helping successful families reach the coordinates that define their life goals. To achieve this, we search the globe for investment opportunities, and deliver targeted long-term and near-term investment strategies for clients in Canada, Australia, the U.K. and Europe.

Learn More

The luxury of simplicity

With access to financial, estate and insurance planning specialists, Canaccord Genuity Advisors are committed to providing clients with a broad array of wealth management solutions to simplify their busy lives and achieve their financial goals.

Learn More

COMPLETE CANACCORD

How long will our money last?

Cabot offers you, your family, and your business our expertise and professional wealth management services.

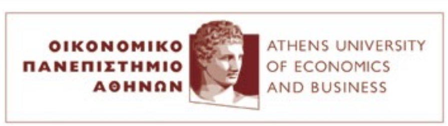
What would you like Cabot to do for you?

Cabot WEALTH MANAGEMENT

If you're an investor with a substantial portfolio, we offer a broad range of wealth planning products and services and can provide you with in-depth guidance designed to help you preserve your wealth and maximize growth potential.

Fidelity

The History



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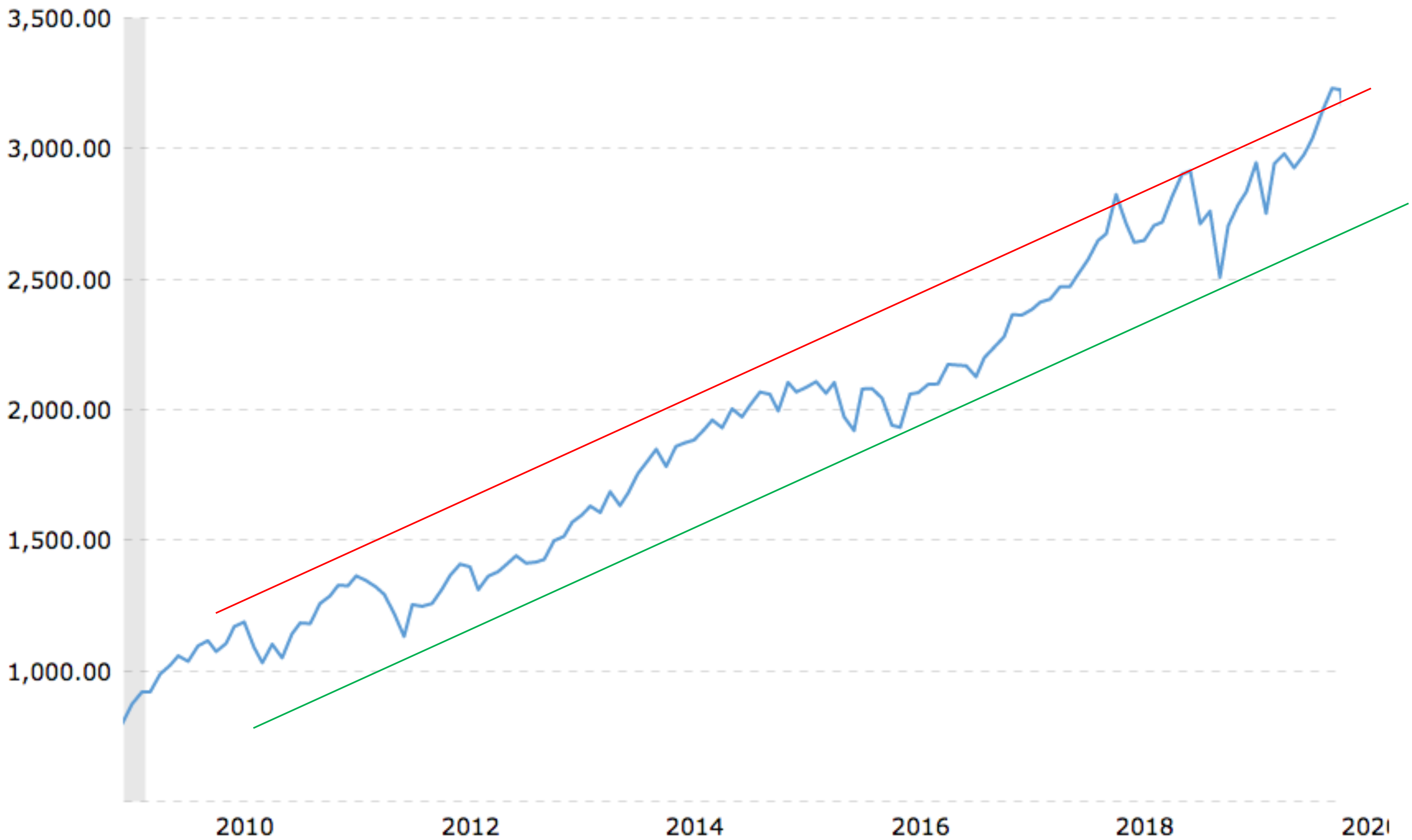
Markets can go up...

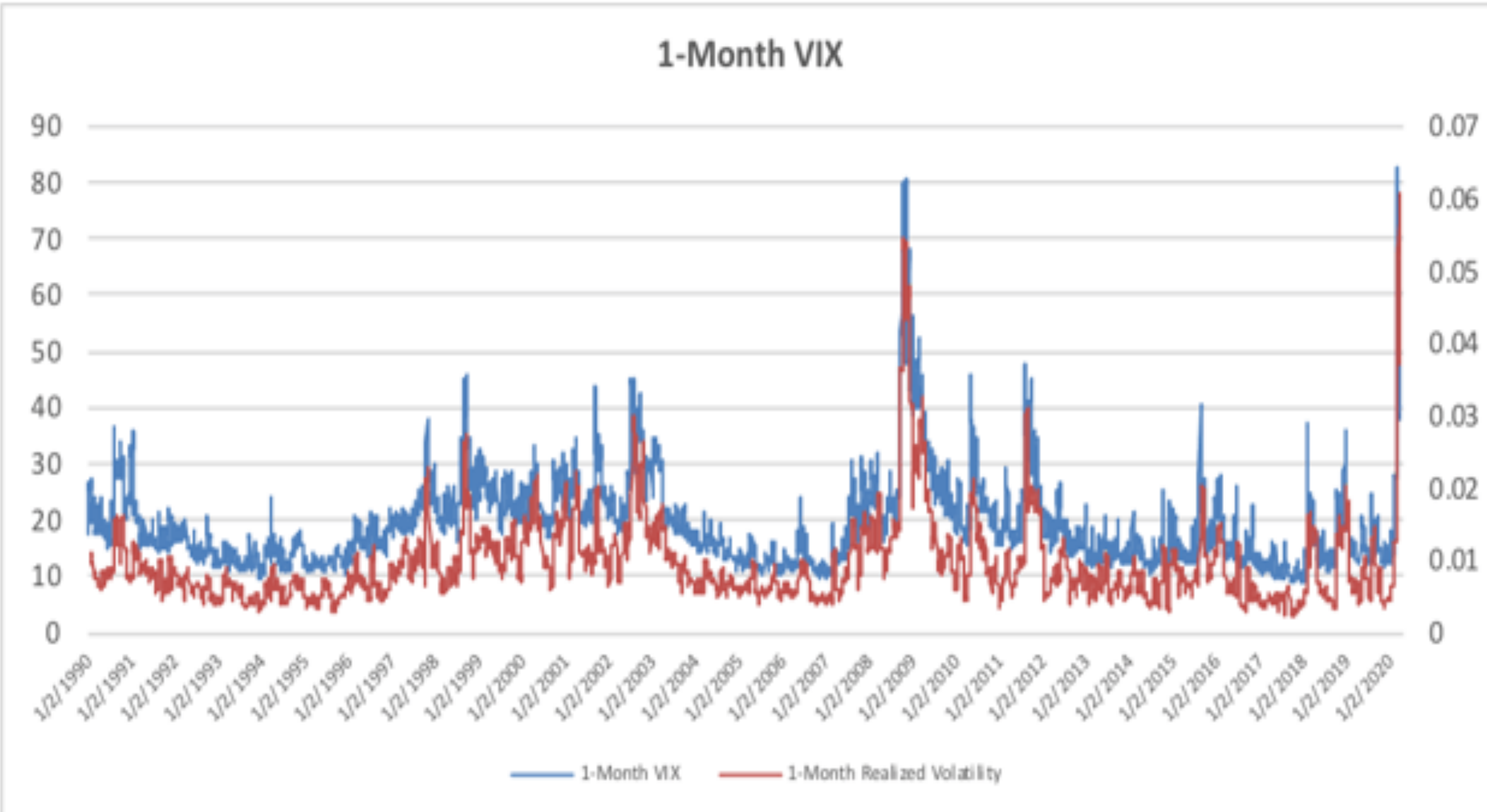


Or down...


60.000
55.000
50.000
45.000
40.000
35.000
30.000
Σεπ 2021
Νοε 2021
Ιαν 2022

Even at the same time!

They have risks...



But portfolios smoothes them

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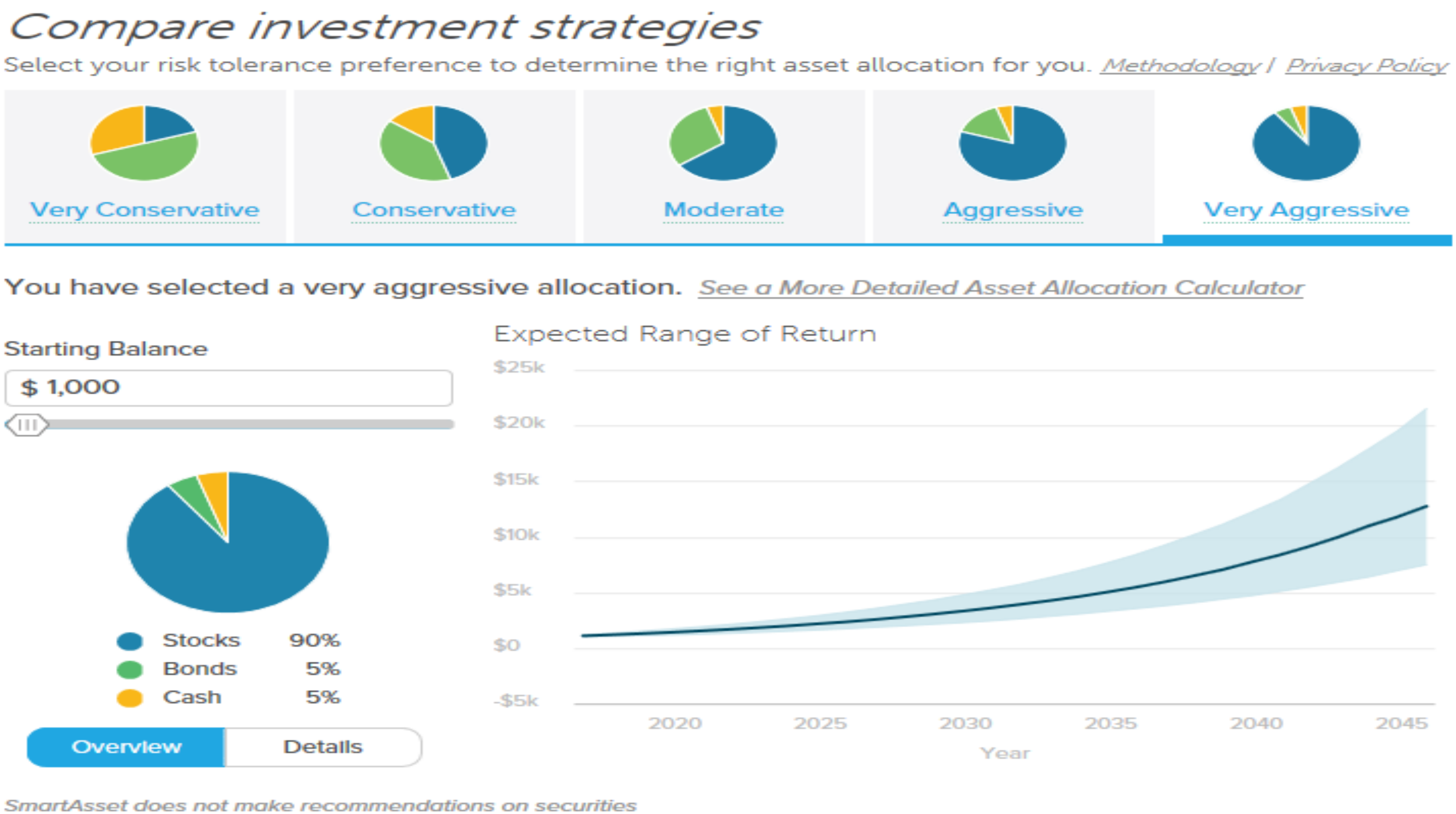
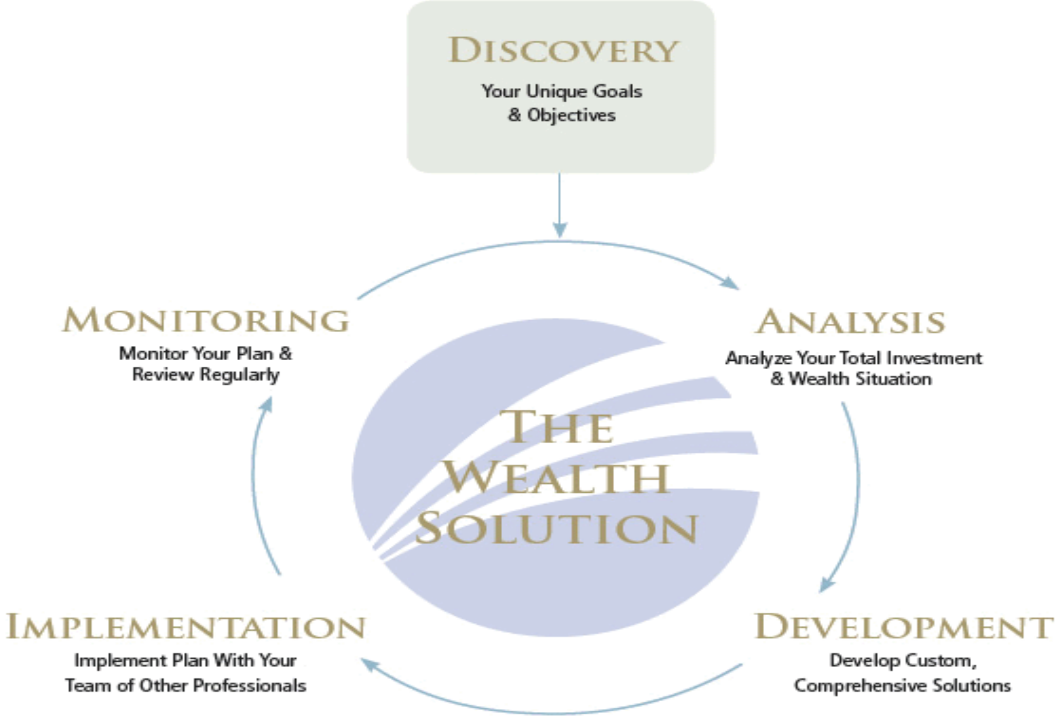
Strategies


Compare investment strategies
Select your risk tolerance preference to determine the right asset allocation for you. Methodology / Privacy Policy
Very Conservative
Conservative
Moderate
Aggressive
Very Aggressive
You have selected a very aggressive allocation. See a More Detailed Asset Allocation Calculator
Starting Balance
$ 1,000
Stocks 90%
Bonds 5%
Cash 5%
Overview
Details
Expected Range of Return
$25k
$20k
$15k
$10k
$5k
$0
-$5k
2020
2025
2030
2035
2040
2045
Year
SmartAsset does not make recommendations on securities

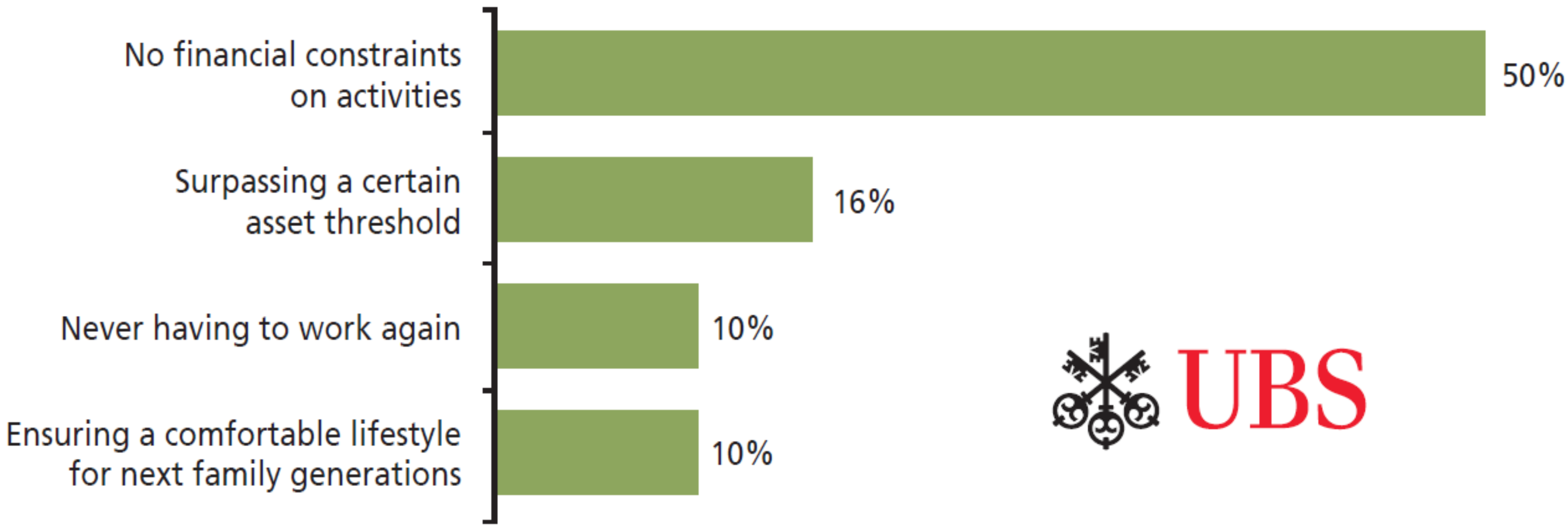
The Process



In order to help you maximize your potential for success in all areas of your financial life, we take a comprehensive approach.

Research

View of what it takes to be wealthy
Question: *"What does it take to be considered 'wealthy'?"*



UBS

UBS

CHANGES THIS MONTH

1) Equities Slight downgrade of US large cap growth stocks in favor of International; focus equity overweight in US mid and small cap.

2) Fixed income We reduce EM to neutral and consolidate our credit overweight in US high yield; still prefer munis to IG corporates.

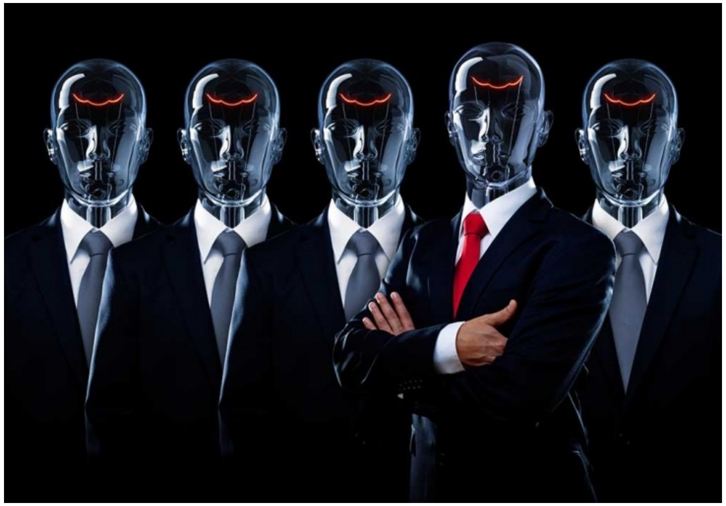
3) Foreign exchange No change to currency views as we continue to favor US dollar versus euro given the gap in economic outlook.

LEGEND

- Overweight: Tactical recommendation to hold more of the asset class than specified in the strategic asset allocation (see pages 24-27)
- Underweight: Tactical recommendation to hold less of the asset class than specified in the strategic asset allocation (see pages 24-27)
- Neutral: Tactical recommendation to hold the asset class in line with its weight in the strategic asset allocation (see pages 24-27)

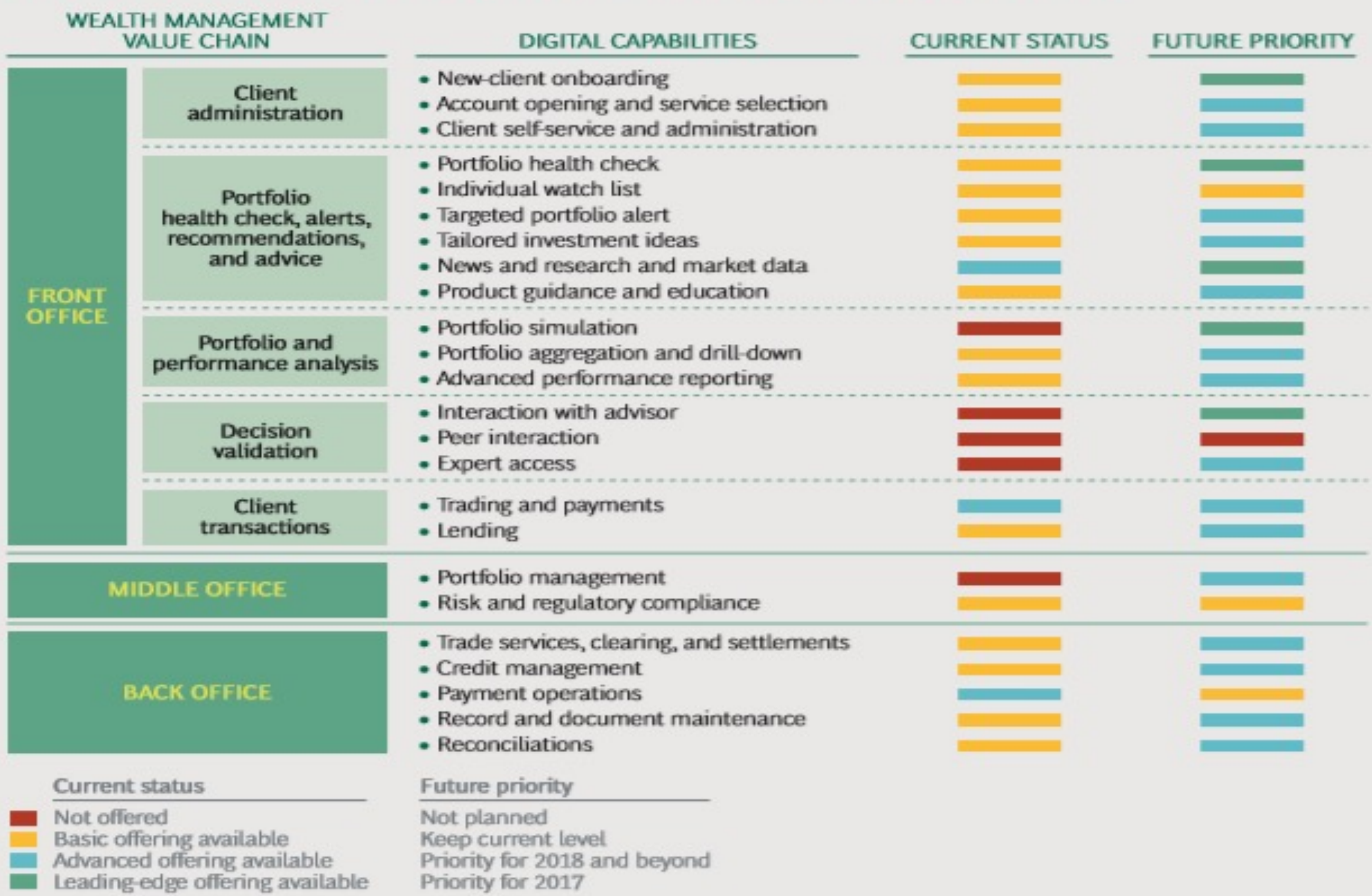
NOTE: TACTICAL TIME HORIZON IS APPROXIMATELY SIX MONTHS

THE FUTURE: ROBOTICS & MACHINE LEARNING



Learning to fly…

EXHIBIT 9 | Many Wealth Managers Today Offer Only Basic Digital Capabilities



Source: BCG Global Wealth Manager Performance Benchmarking Database, 2017.

BCG
THE BOSTON CONSULTING GROUP

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Wealth is everything you value in your life. Tangible or not!
Manage its risks._

THANK YOU.

Contact me: tkrintas@aueb.gr or tnk@koubaras.eu

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