In this issue of *Investments & Wealth Monitor* (I&WM), we tackle the hot topic of the “Advisor of the Future.” Transformational changes are sweeping our industry, and advisors need to respond by evolving the way they do business and present their value proposition. They need to learn how to deal with disruptive technologies and new types of investments. The advisor of the future also must adapt to changing demographics—among both advisors and clients.

We start with an interview conducted by Todd Thomson with Scott Welch and myself titled “Advisor Alpha.” Scott and I cover a lot of issues that fall under this heading, ranging from the positioning of an advisor’s value proposition to how to build a portfolio. Then Paul Schaeffer and Steven Unzicker offer another perspective with “Future Advice: What Will Advisory Services Look Like in Five Years?” Michael Kittes discusses “The Rise of the Cyborg Advisor,” and David Cohen and Matthew Patterson get specific about how “Demographics Demand a New Approach.”

Monique Miller and Ray Joseph discuss the future implications for actual investments in their article, “Managing Downside Risk with Factor-Based Investment Strategies.”


As a bonus, Rick Capozzi makes his case that “The Best Leaders Get the Culture Right: Proven Levers to Change a Corporate Culture.” David York discusses “How to Design a Riveted Estate Plan.” And I&WM Ethics Editor Mark Harbour interviews Jim Ware about developmental mindsets in “Money, Meaning, and Mindsets.”

As always, we hope you find this issue of I&WM informative and useful—and please let us know your ideas for future topics, research, or authors.

Anthony B. Davidow, CIMA®
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