

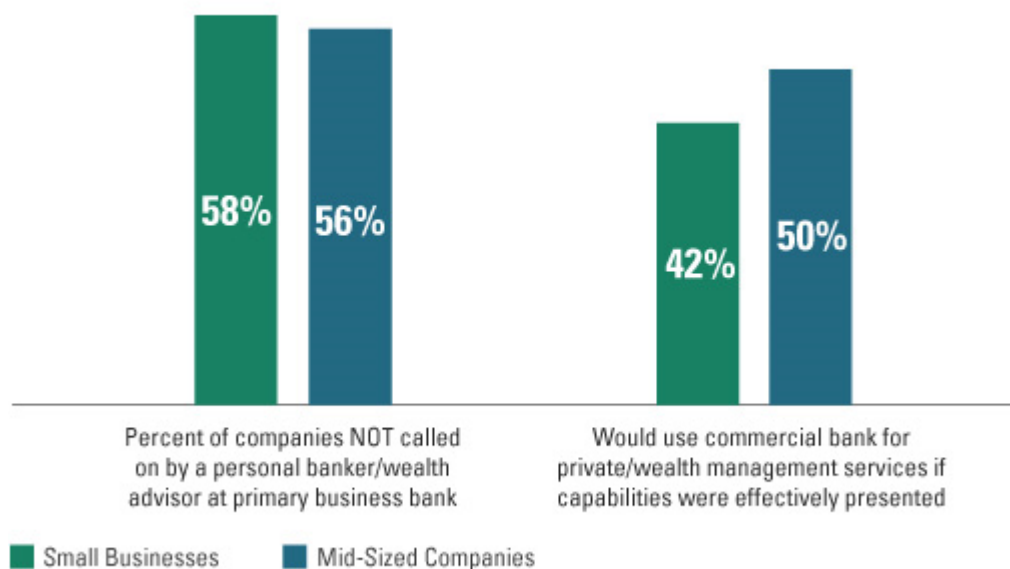
Most Small/Mid-Sized Companies Unaware of Their Bank's Wealth Solutions

March 18, 2015

More than 50% of owners/executives at both small and mid-sized companies have never been asked by their primary bank about their private banking and wealth management needs.

Importantly, a full 42% and 50% of these small and mid-sized business executives, respectively, would consider using their commercial bank for private/wealth management services if they were presented those capabilities effectively.

Perceptions of Commercial Bank Wealth Management



Source: Greenwich Market Pulse v54

Bottom Line

- Commercial banks are missing a significant opportunity to win new wealth management business
- Based on Greenwich Research, the private bank and wealth management units of regional banks can meet the product needs of most business owners and executives in the private banking/wealth management segment

To win the private banking/wealth management business of small company owners, banks must focus on effectively portraying their investment advice and capabilities as a majority of prospective clients see this as a potential weakness



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