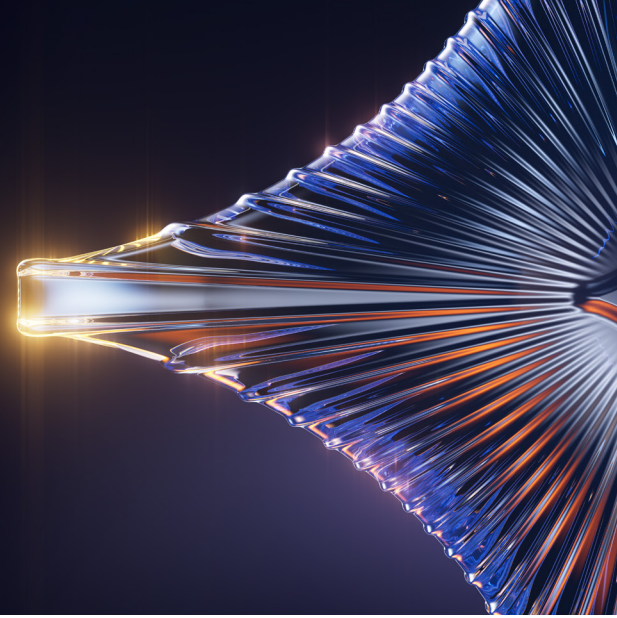




# Wealth management specialism



Wealth management firms face growing complexity, from regulatory change and expansion plans to succession and transactions. Having the right advisors in place helps businesses make better decisions and **seize opportunities with confidence.**

## Key trends facing wealth managers:

*Industry consolidation is accelerating with private equity - a major driver*

The UK wealth management market remains highly fragmented, but private equity-backed consolidators and larger national firms continue to acquire smaller wealth managers and financial planning businesses.

Scale is increasingly important as firms seek to spread regulatory, technology, and operational costs across a larger client base. Many firms are evaluating how they can create value ahead of a future transaction or investment event.

## How HaysMac can help:

We work with management and finance teams to ensure they are fully prepared for key strategic events, helping them maximise value and achieve the best possible outcome.

Our support begins long before a transaction or key event occurs, helping businesses position themselves effectively and address potential challenges in advance.

We support clients before, during and after the transaction, ensuring a smooth and successful integration. We also have a long track record of working with private equity so understand investors and what they are looking for.

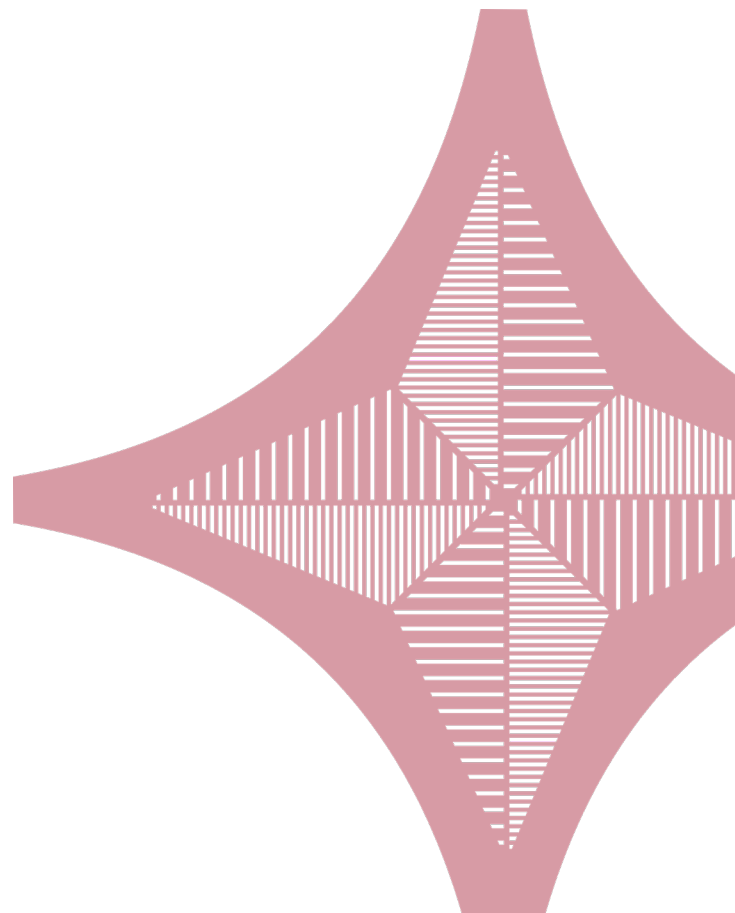
## Succession planning is becoming more important

Many owner-managed wealth management businesses face challenges around advisor succession, talent retention and ownership transition, contributing to ongoing consolidation across the sector. Too often, succession planning begins too late, limiting strategic options and reducing the opportunity to maximise business value.

## How HaysMac can help:

We work closely with business owners to develop succession plans, implement shareholder strategies and prepare organisations for future leadership transitions.

Early planning helps protect enterprise value and ensures continuity for clients, employees and stakeholders.



### *Technology and AI are transforming advice models*

Artificial intelligence is rapidly moving from experimentation to implementation. Wealth managers are investing in AI-enabled tools to improve client servicing, increase advisor productivity, enhance personalisation and strengthen compliance processes.

#### **How HaysMac can help:**

We have sat at the intersection of wealth and technology for several years now and watched the WealthTech industry grow from the first robo-advisors to the all-encompassing industry that it is today.

Our understanding and expertise in FinTech is increasingly being utilised across the broader wealth management space.

### *Regulatory scrutiny continues to increase*

The FCA's Consumer Duty, changes in accountancy practices for smaller firms and broader regulatory expectations, are driving greater focus on governance, pricing transparency, client outcomes and operational resilience.

#### **How HaysMac can help:**

We believe regulatory change presents both the greatest challenge and the greatest opportunity for wealth management firms.

Success depends on staying ahead of evolving regulation, adapting operating models proactively, and leveraging technology to manage compliance efficiently. Firms that embrace change can strengthen client outcomes, improve efficiency and create a competitive advantage.

### *Client expectations have changed*

It has never been more important for accountancy firms and wealth managers to work together, pulling in the same direction for their private clients.

Clients increasingly expect wealth managers to deliver a seamless digital experience alongside trusted personal advice, integrated with their personal accounting lives. They want greater transparency, more joined-up personalised solutions, and access to a comprehensive view of their personal balance sheet.

#### **How HaysMac can help:**

We have deep relationships across the wealth management sector through our Private Client Team. Helping hundreds of clients navigate life's tax and financial challenges.

Our team is well known for having friendly, approachable people who excel at understanding your world – whether business or personal – delivering clear, pragmatic, and actionable advice.

### **Summary**

That's where HaysMac comes in – supporting you every step of the way as you navigate an ever-changing environment.

The UK wealth management sector is undergoing profound change. Consolidation, private equity investment, regulatory developments, technological innovation and changing client expectations are reshaping the competitive landscape.

As firms navigate growth, succession, acquisition opportunities and evolving operating models, the need for strategic advice has never been greater. Having the right advisors around you ensures that critical decisions are considered from every angle well in advance of key events, helping businesses maximise value, manage risk and position themselves for long-term success.

### **Our key wealth management services**

- ✦ Corporate Tax
- ✦ Personal Tax
- ✦ Audit
- ✦ Deal Advisory & Transaction Services
- ✦ Private Client Services



# Our Wealth Management Team



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