



2025/26 NATIONAL INTEGRATED SPECIAL REPORT –
DIGITAL AND NEWSPAPER

Strategic Wealth Management

Adapting to change in a new era of advisory excellence

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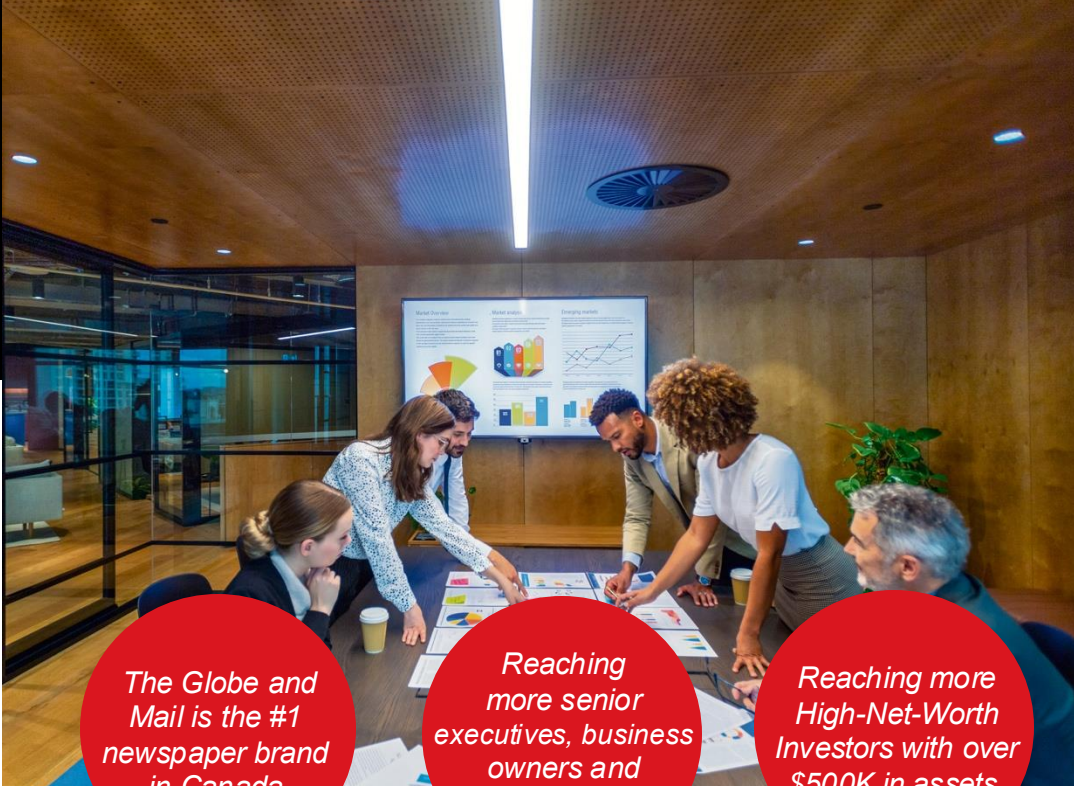


Across Canada, wealth management is evolving as client expectations rise, markets fluctuate and investment options continue to diversify. Firms are re-evaluating how they deliver advice, balance human insight with technology, and uphold trust in a dynamic financial environment. This special feature will spotlight how the country's leading wealth management professionals and institutions are evolving their strategies to navigate uncertainty, strengthen relationships and build long-term value for clients.

- Proposed topic highlights:**
- EVOLVING INDUSTRY DYNAMICS — How demographic shifts, economic pressures and new regulations are reshaping Canada's wealth management landscape.
 - STRATEGIC INSIGHT — The approaches driving resilient portfolios, risk-aware decision-making and long-term client confidence.
 - TECHNOLOGY — Balancing digital innovation with the personal relationships that define trusted advice.
 - CLIENT EXPERIENCE & TRUST — Building engagement in an increasingly competitive marketplace.
 - SUSTAINABLE AND RESPONSIBLE INVESTING — How ESG principles continue to influence client priorities and product development.
 - THE FUTURE OF WEALTH MANAGEMENT — Exploring how strategy, innovation and collaboration will define the next generation of advisory success.

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Source: Vividata SCC Fall, 2024, National, Adults 18+

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November 14	January 9	January 16
February 6	March 20	March 27