

George Wilbanks

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WILBANKS PARTNERS

Major Rotation of Skills Underway

Towards:

➤ **Technology**

- Increased investment in infrastructure tech to drive efficiency and security.
- Increased use of technology to drive research and risk management sophistication and speed.
- Significant ongoing upgrading of quant and risk tools to counter behavioral bias and drive more persistent performance.
- Dramatic gains underway through use of more sophisticated martech stack.



Major Rotation of Skills Underway

Towards:

➤ **Distribution**

- Sophisticated solutions based client facing interactions are now the table stakes (see blog: http://wilbankspartners.com/wp-content/uploads/2019/05/Beyond-an-Aggressive-Sales-Culture_Wilbanks.pdf)
- Increased use of quant-based modeling to mirror client asset class and portfolio construction optimization modeling
- Expansion of solutions-based investment strategies, including LDI, all-weather, total return, tactical asset allocation, alpha transfer, risk collaring, global macro, just to name a few.
- Return to the basics of more sophisticated marketing programs that include technology enabled, digitally driven micro-segmentation initiatives (See blog: <https://wilbankspartners.com/wp-market-commentary-asset-managers-return-to-marketing-basics/>).

Major Rotation of Skills Underway

Towards:

- **Alternative investments and other investment strategies that focus on less efficient, higher volatility asset classes with higher active share.**



Major Rotation of Skills Underway

Towards:

- **Leadership skills that encompass a multi-dimensional toolkit including investments, client facing expertise, technology, strategy and finance, among others.**

(See blog: <https://wilbankspartners.com/wilbanks-partners-commentary-leadership-transitions-accelerating-the-pace-of-change/>).



Major Rotation of Skills Underway

Away from:

- Core investment products.
- Golf-and-conference, commission-based star sales professional organizations.
- High risk, star portfolio managers.
- One size fits all investment strategies. “You can’t get through the door with a nine-style box trailing returns pitch book.”
- Linear career tracks in one discipline.



George Wilbanks, Wilbanks Partners llc

George Wilbanks spent over 20 years building the asset and wealth management practice at Russell Reynolds Associates to an industry leading position before founding Wilbanks Partners LLC in 2011. Earlier he had worked with a venture capital and family office business Agtek International, and then The Dreyfus Corporation in business development as Assistant to the Chairman. A graduate of Williams College with a degree in Political Philosophy, he subsequently earned his MBA in Marketing at New York University's graduate school of business.

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