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NEW FIDELITY® REPORT HELPS WEALTH MANAGEMENT FIRMS TACKLE TOP ORGANIC GROWTH BARRIER: TIME MANAGEMENT

BOSTON, October 15, 2025 – Fidelity Investments' new data-driven report, "[The Time-Value Equation: Strategic time management for financial advisors](#)," aims to help wealth management firm leaders and their advisors develop dedicated growth strategies and implement a more intentional approach to time management that could yield significant opportunity – potentially up to \$270,000 in additional revenue per year, per advisor by re-allocating just five more hours per week to clients and prospects.ⁱ

While [organic growth continues to be top of mind](#), wealth management firms still struggle to prioritize it. Advisors blame a lack of time.ⁱⁱ In fact, only 27% say they spend their time at work on high-value activities, with just 41% of their day being dedicated to supporting clients and prospects.ⁱⁱⁱ The real culprit may be a reactive mindset, but leaders can drive a shift within their organizations.

"Protecting your time starts with defining your value," says Tobias Donath, head of Go-To-Market and Strategy for Fidelity Institutional Wealth Management Services, "Flipping the phrase, 'I don't have time for that,' to 'That's not a priority' can help you be more strategic with your time and puts a new lens on defining higher-value work."

The report explores how firms can maximize value by re-examining whom advisors spend time with, what they spend time on, and how they use that time. Though there isn't a one-size-fits-all prescription for designing a day, firm leaders can begin by:

1. **Enabling more time for clients.** 59% of advisor time goes to administration, compliance and other non-client tasks^{iv}, but we know that wealthier investors increasingly want more complex, white glove services. Consider where technology or outsourcing can help with routine tasks and free up time to focus on clients – particularly as high net worth (HNW) investors want their advisor's help in planning for healthcare costs and making career or lifestyle decisions.^v
2. **Prioritizing multi-generational engagement.** Three-quarters of HNW investors want to spend more time discussing finances with their adult children, and half want advisors to support those conversations.^{vi} However, advisors aren't engaging families as frequently due to a lack of good, consistent processes.^{vii} Leaders who formalize family engagement as a business priority can help advisors focus on deepening these relationships can set firms up for success as wealth transfers.

3. **Investing in talent and culture.** Advisors who are more satisfied with their career say they spend more time on high value activities that focus on the unique needs of clients and prospects (50% vs. 23%)^{viii}. Leaders can promote growth-boosting activity by encouraging a clear, actionable business plan and helping advisors work at the top of the [Advice Value Stack](#)[®]. In fact, those with a written plan have a 50% higher organic growth rate than those without.^{ix}

To learn more, visit <https://clearingcustody.fidelity.com/insights/spotlights/the-time-value-equation-strategic-time-management-for-financial-advisors>.

Methodology: 2025 Fidelity Advisor Insights Study

This study was an online blind survey (Fidelity not identified) and was fielded during the period February 18 through February 26, 2025. Participants included 479 advisors who manage or advise upon client assets either individually or as a team, and work primarily with individual investors. Advisor firm types included a mix of banks, independent broker-dealers, insurance companies, regional broker-dealers, RIAs, and national brokerage firms (commonly referred to as wirehouses), with findings weighted to reflect industry composition. The study was conducted by an independent firm not affiliated with Fidelity Investments.

Methodology: 2025 Fidelity Investor Insights Study

This study was conducted during the period February 7 through February 25, 2025. It surveyed a total of 2,018 investors, including 998 Millionaires and 1,215 investors with advisors. The study was conducted via an online survey, with the sample provided by an independent firm not affiliated with Fidelity. Respondents were screened for a minimum level of \$50K in investable assets (excluding retirement assets and primary residence), with additional quotas by age and affluence levels.

Methodology: 2024 Fidelity Financial Advisor Community – Industry Trends Study

This was an online blind survey (Fidelity not identified) and was fielded during the period February 2 through February 15, 2024. Participants included 432 advisors who manage or advise upon client assets either individually or as a team, and work primarily with individual investors. Advisor firm types included a mix of banks, independent broker-dealers, insurance companies, regional broker-dealers, RIAs, and national brokerage firms (commonly referred to as wirehouses), with findings weighted to reflect industry composition. The study was conducted by an independent firm not affiliated with Fidelity Investments

Methodology: 2024 RIA Benchmarking Study

This study was conducted between February 5 and April 19, 2024; 310 firms participated. The study was administered online by an independent third-party research firm not affiliated with Fidelity. Fidelity was identified as the sponsor of all the studies. The experiences of the RIAs who responded may not be representative of the experiences of other RIAs and are not an indication of future success

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ⁱ Analysis by Fidelity. Source data: 2025 Fidelity Advisor Insights Study and 2024 Fidelity RIA Benchmarking Study. Assumes that the advisor currently generates \$1M in annual revenue, and spends 41% of their time each week supporting clients and prospects.

ⁱⁱ 2024 Fidelity Financial Advisor Community – Industry Trends Study

ⁱⁱⁱ 2025 Fidelity Advisor Insights Study

^{iv} 2025 Fidelity Advisor Insights Study

^v 2025 Fidelity Investor Insights Study

^{vi} 2025 Fidelity Investor Insights Study

^{vii} 2025 Fidelity Advisor Insights Study

^{viii} 2025 Fidelity Advisor Insights Study

^{ix} 2025 Fidelity Advisor Insights Study