

# Robo-advisory e dintorni

Esperienze olistiche e conseguenze possibili



19 settembre 2017

**you invest**  
LA SCUOLA PER INVESTIRE

# Input 1: le cose della vita

**Timeline**

Add life events and stages such as weddings, college, buying a home, and starting a business. Click Next to continue

**Events**

First, select an owner

- John
- Julia
- Alex
- Martina

Second, drag and drop an event icon into the Timeline

Birth	Mid-Life Crisis	Travel	Retirement
Daycare	Part Time	Inheritance	Disability
Celebration	Remodel	College	Critical Illness
House	Start Business	Wedding	Mortality
Boat	Other	Link	

**Stages**


Drag and drop a stage color into the Timeline

Home with kids	Early Retirement
College	Empty Nest
Survivorship	Back to School
Slowing Down	New Business
Other	Work Part Time

Show Names

**Next**

## Input 2 (tbc...): gli investimenti

Type  

Account Name

Account Balance \$

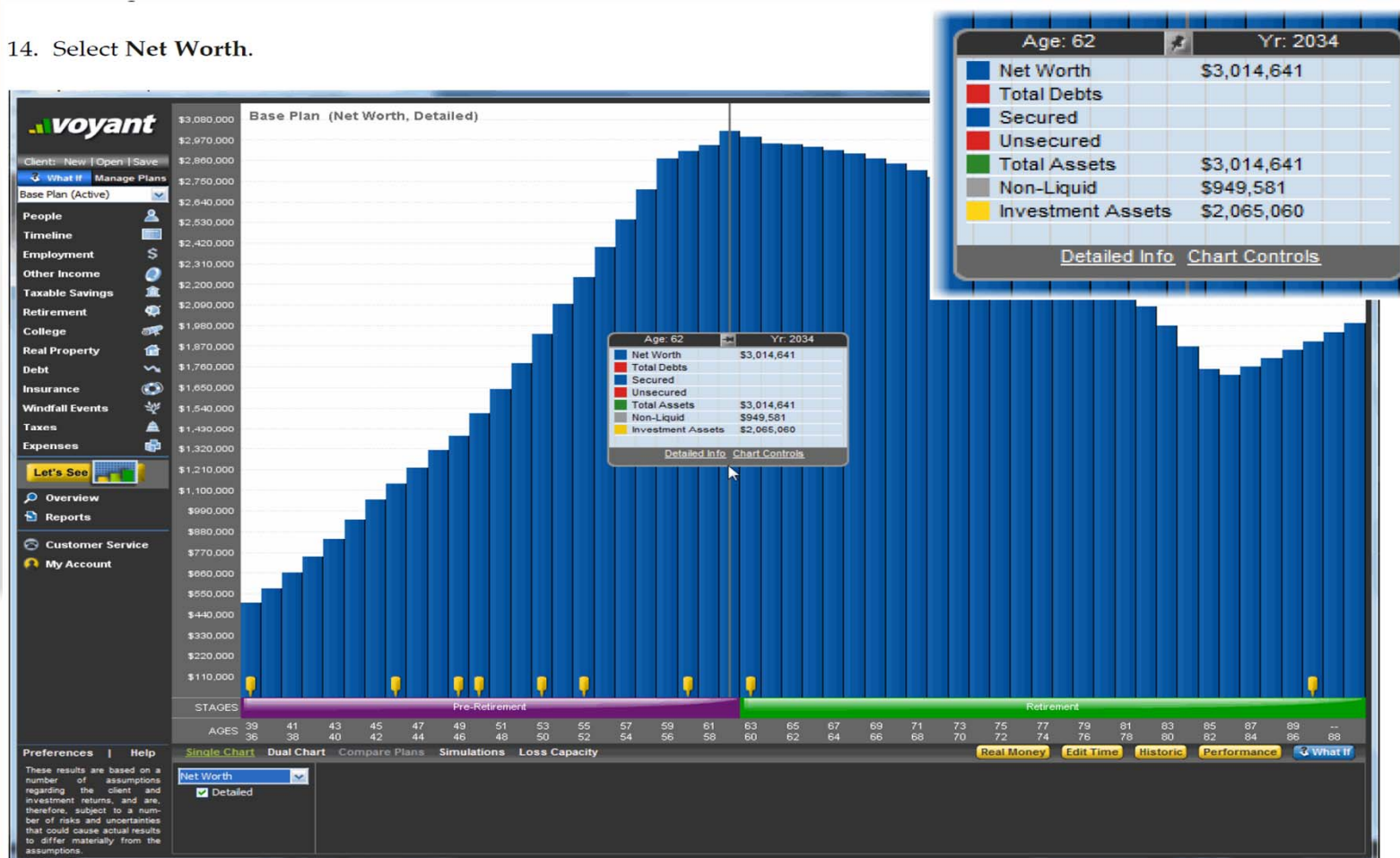
Cost Basis \$

Annual Contribution \$  or  %

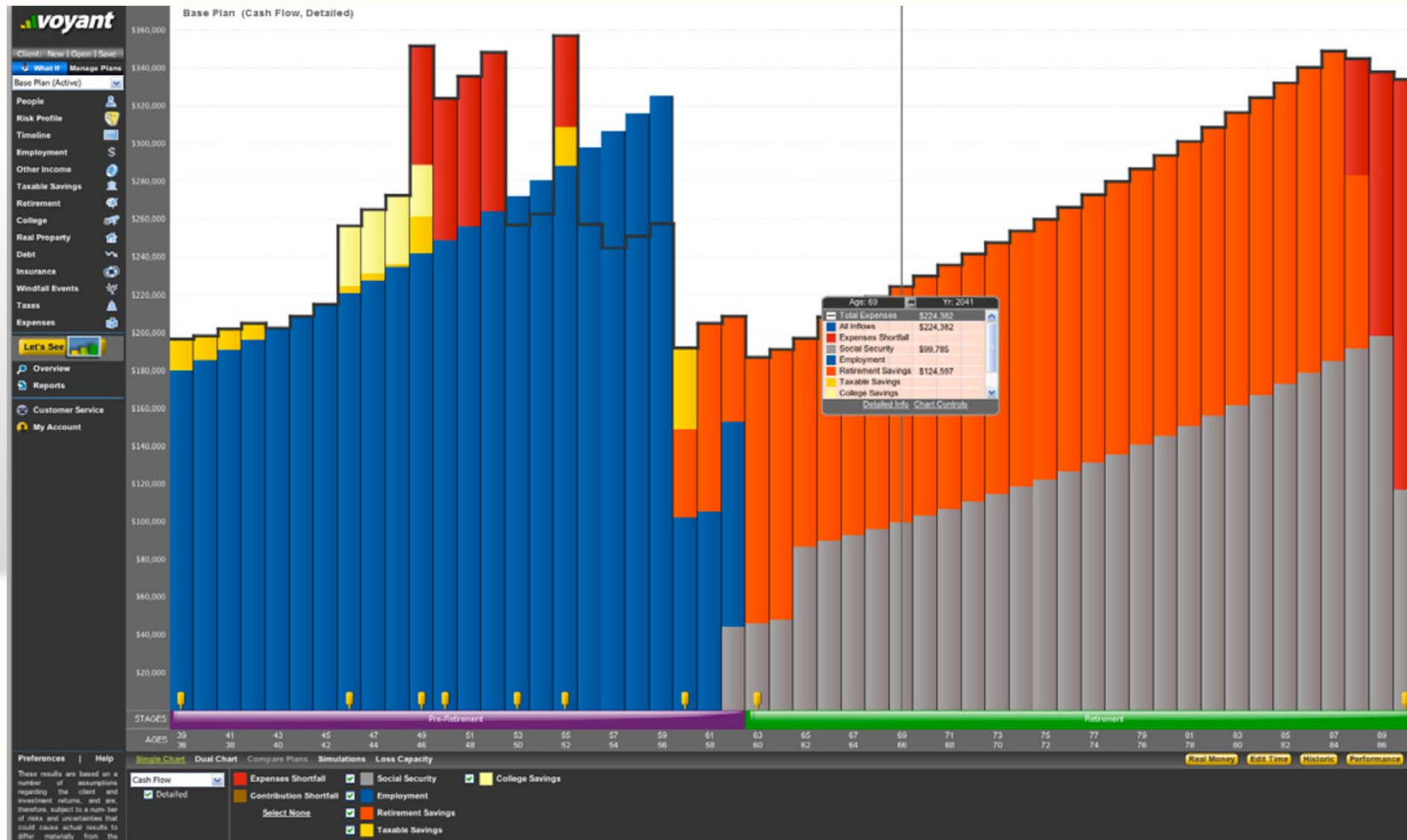
Contribute Before Paying Expenses

# Output 1: mappa patrimonio

14. Select Net Worth.



# Output 2 (tbc...): cash-flow analysis



# Questioni aperte

Cosa comporta l'adozione di un modello olistico



- ✓ **Esistono clienti interessati?**
- ✓ **E' un mestiere per banche?**
- ✓ **Come si guadagna? Quanto?**
- ✓ **E' tutto robotizzabile?**
- ✓ **Reporting o advisory?**





***Grazie***