

World Financial Planning Day

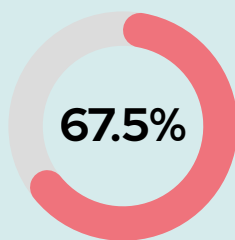
“Will AI Replace Financial Planners?” Survey Highlights

Aim: Examine respondents’ adoption of AI in financial management, application scenarios, trust levels, willingness to pay, risk concerns and views on future industry trends.

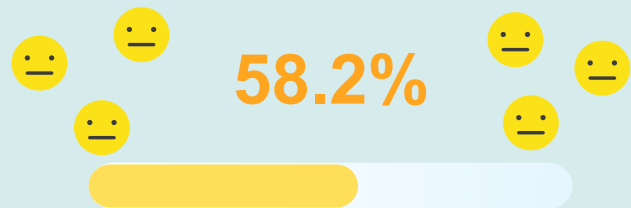
Survey Background

- Survey period: 22/9 - 29/9/2026
- Sample size: 249

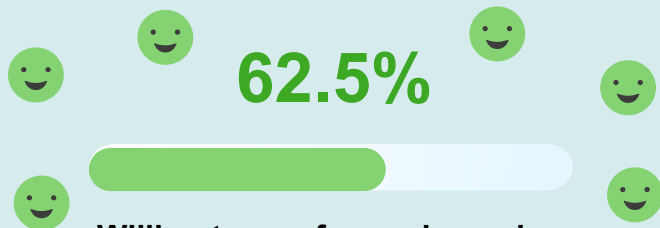
Acceptance Towards AI-enabled Financial Management



Had used AI tools to handle financial or wealth-management-related matters



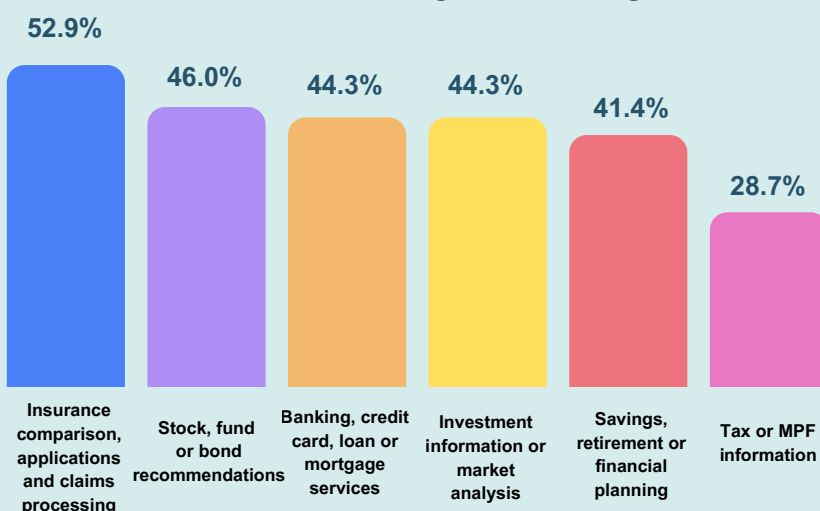
Agreed AI developing too rapidly and difficult to control in the short term



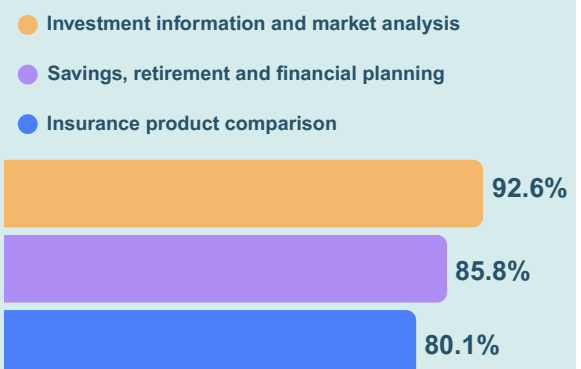
Willing to pay for such services of AI financial management

AI Applications

AI financial management usage

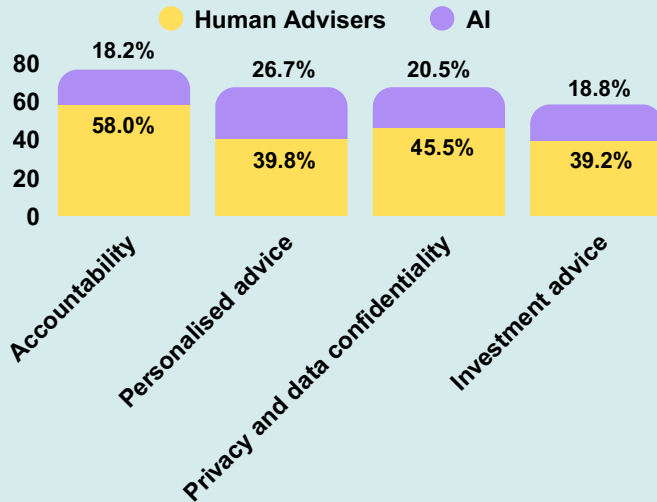


The most helpfulness terms of AI

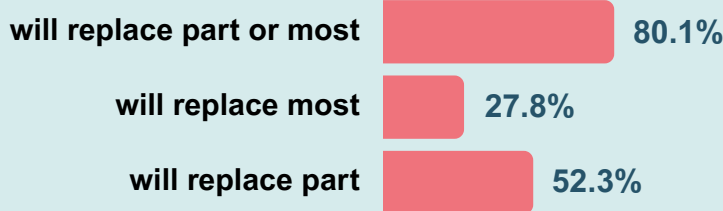


AI vs Human Advisors

Compare the trust between AI and human financial advisers



AI to replace human advisers over the next five years



Paid service models for financial management



50%: Human-led, AI-assisted
26.7%: AI-led, human-assisted



Data Security and Practical Concerns

