Differentiating your Practice: Private markets

Private markets can open doors to opportunities that traditional portfolios can't always reach.

Diversification[1] beyond public markets

Potential for consistent income and growth

Reduced exposure to daily market swings

Three ways private markets can set your practice apart:

1 Robust offering

Expanding into private markets means you can offer a wider range of investments, giving clients more ways to meet their goals.

2 Forward looking

The next generation of wealthy investors is more likely to expect access to private markets than their parents.[2] By meeting that expectation now, you can position your practice as innovative and competitive.

3 Relationship building

Private markets require a long-term mindset, which naturally fosters deeper client relationships. These investments often span years, giving you ongoing opportunities to engage clients, provide updates, and celebrate milestones.

Next steps

Use our step-by-step guide.
On the reverse, you'll find a guide to evaluate your practice in these three areas.

1. Diversification does not ensure a profit or protect against losses.
2. CapGemini World Wealth Report 2025.

Assessing the role of private markets in your practice

1

Broad offering

Offering private markets can help position your practice as a trusted partner to clients.

If this is a strength

- Continue to feature private market solutions in client reviews.
- Share examples of how private markets have complemented client portfolios.
- Highlight diversification[1] as a differentiator.

If this is a priority for growth

- Identify potential gaps in your current offering and research available private market products.
- Partner with a top-tier manager to understand strategies and fit for your business.
- Build a shortlist of private market options that align with your client base.

Notes

2

Forward-looking

Anticipating the needs of the next generation of investors can help you remain competitive.

If this is a strength

- Engage younger clients with content on private markets.
- Include private markets-specific insights in client communications.
- Host events or webinars focused on alternative investment opportunities.

If this is a priority for growth

- Survey next-gen clients about their interest in private markets.
- Connect private markets to next-gen portfolio priorities.
- Introduce private markets to younger clients and position yourself as a thought leader.

Notes

1. Diversification does not ensure a profit or protect against losses.

Assessing the role of private markets in your practice

3

Relationship building

Investments that require a long-term mindset create opportunities to engage clients, provide insight, and strengthen trust over time.

If this is a strength

- Continue to use private market investments to anchor long-term planning conversations.
- Reinforce trust by providing regular updates on private markets within the macro outlook.
- Celebrate milestones in investment journeys.

If this is a priority for growth

- Identify clients who could benefit from a long-term strategy and start the discussion.
- Explore reporting tools that improve transparency for clients.
- Schedule check-ins to keep clients engaged over the life of their investments.

Notes

Quick tips for client conversations

Track progress

Review this worksheet regularly to track progress.

Aim high

Work to qualify for actionable steps in the "strong" column for all three categories.

Be strategic

Use private markets strategically as a complement to your existing offering.

Important disclosure information

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