



Managing CHANGE

Wealth management expert Stuart Dunn has seen significant change in the investment banking sector during his multi-decade career. Here he talks to Abode2 on the virtues of embracing financial technology and moving with the digital times

Looking back over the past 50 years both in a professional capacity in my role as an investment manager and as steward of our family assets, it's true to say I've acquired a somewhat unique perspective on the ever changing and challenging investment landscape.

In the early days, I was a broker for a large investment dealer in Canada and my hunter gatherer mandate was to go out and bring in as much business as I could. I found this chosen career path to be somewhat soulless and unfulfilling, as my primary concern was to enrich myself and the organisation I was working for.

In later years, I transitioned to an in-house role, managing other clients' financial interests, along with those assets that belonged to my family. This shift of focus was definitely a step change for the better. I was now entrusted with the assets of pension funds, endowments, and those of wealthy individuals. Finally, there was meaning to my work, and I must say, I enjoyed it immensely.

In time however, I realised that the most rewarding and fulfilling role I could take on in the investment sector, was managing the financial interests of my family and my siblings.

What started as a traditional asset mix of stocks, bonds, and cash 30 years ago, morphed into a more diversified portfolio over the past 10 years, as technology exposed us to new opportunities in private equity, venture capital, and real estate.

In that period, financial technology (FinTech) advanced at warp speed and the world was sprinting to keep up. We in turn, had to embrace those changes, introducing alternative investment and savings options and solutions to a family unit

spanning three generations.

It's easy to see how delving into the boundary-pushing world of digital finance could be daunting for some, especially in what is largely a traditionally conservative industry. However, truth be told, we've been living in a high-functioning digital age for quite some time now. FinTech (Financial Technology) is here to stay. For banks to be successful in digitally enabling their business, they must adopt a more proactive stance, to avoid impeding their ability to generate new growth opportunities, and escape the vice of competition from digital attackers, not to mention diminishing returns.

Over the years, Holdun evolved from being an investment firm to a single-family office, through to a multi-family office today. On the digital front, it created a Fintech accelerator to support FinTech entrepreneurs, alongside a digital finance platform.

Holdun recognises that, not only is the digitisation of money now a mainstream necessity, so too is the digitisation of ownership of assets. The future of investment management is upon the investment community. Adapting is the only way to stay relevant - this, Holdun understands.

Based in the Bahamas and Cayman Islands, Holdun is an international award-winning, independent 5th generation multi-family office that helps families and businesses build wealth and security for generations.

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