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Study of the rules implemented by banks for matching client profiles with products as part of an investment advisory service

This study looks at the processes implemented by banks to ensure that their investment advisory services are suited to their clients' profiles. The objective is to understand how institutions have implemented these rules and gauge the impact these rules have had on the range of financial investments offered to clients and the role played by advisors.

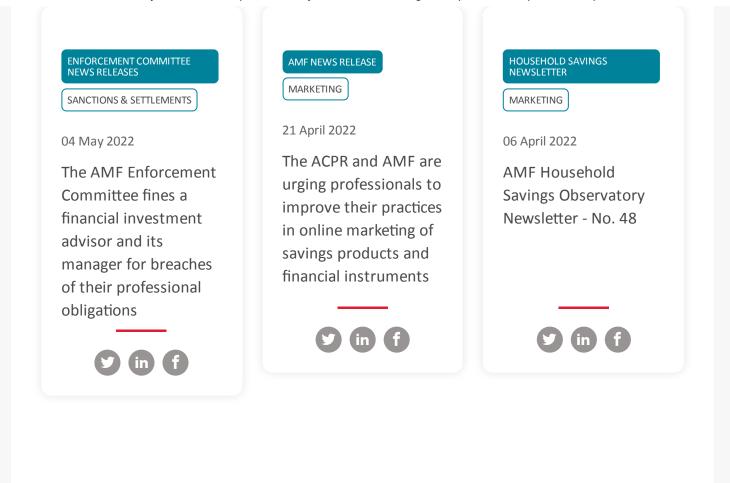


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