

A Study on Mental Models for the Manages Finance Specialist of the Financial Industry : A Double-Loop Learning Perspectiv

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ABSTRACT

Nowadays the business of the private wealth management has been booming and thriving, therefore this influences not only the business positioning but also the growing opportunities of financial firms. The private wealth management has transformed from a negligible part in banks into the main interests of Taiwan ' s investors only in three years.

The main purpose of this study is to discuss the Mental Models on finance specialists based on the perspective of the Double-Loop Learning. The research indicates that the financial specialists are apt to improve their strategies by using the Mental Model of Single-Loop Learning and they tend to benefit their companies and themselves more than the asset allocation of their clients when considering an investing option. The application of the Double-Loop Learning not only upgrades the mental model of the financial specialists but also addresses the difficulties of the organisation, in addition, helps the managing of customer relationship. Due to these advantages, both the financial specialists and their firms are capable to adjust to the changing of environment.

To sum up, this study points out the suggestions on the aspects of the income of operation fees, customers ' asset allocation, financial profession, customer satisfaction for the financial firms and the financial specialists. Moreover, the findings of this research could help enhance the profession of the financial specialists.

Keywords : wealth management、 mental models、 organization learning、 single loop

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