$31B Revenue Opportunity for Financial Firms

$31B of potential revenue in play from wealthy investors under the age of 55.

Under-55 wealthy investors hold 37% of investable assets in U.S., moreover 55% expect significant increase from gift or inheritance over the next 10 years.

36% of under-55s spend more than 10 hours a month managing their investments. Only 20% of over-55s do so.

20% of under-55s are likely to switch financial advisors in next year. Among older investors only 4% are likely to switch.

29% of under-55s don’t have a financial advisor at all but more than 2/3 of these are willing to work with one.

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Build a Trusting Relationship with Younger Investors

27% percent of younger investors trust their fellow investors over professional financial advisers...

...vs. 4% of older investors

46% of under-55s have used a social network for investment activities.

18% ask for recommendation on advisers via social media.

15% contact an adviser about becoming a client via social media.

62% of under-55s want the option of having video meetings with advisers.

53% of under-55s are interested in meeting with multiple experts via HD video from the adviser’s office.

50% of all wealthy investors have used video to meet with friends, family, or colleagues in the past year.

57% of under-55s are willing to move some of their assets to firms that offer video capabilities.

19% of under-55s live more than 50 miles from their adviser...

...they rarely meet face-to-face.

71% use a PC to check or manage their investments at least once per month.

22% of under-55s use their firm social media networking page.

36% do so daily.

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