

Millennial and Generation X Investors: Attracting the Next Generations of Wealth



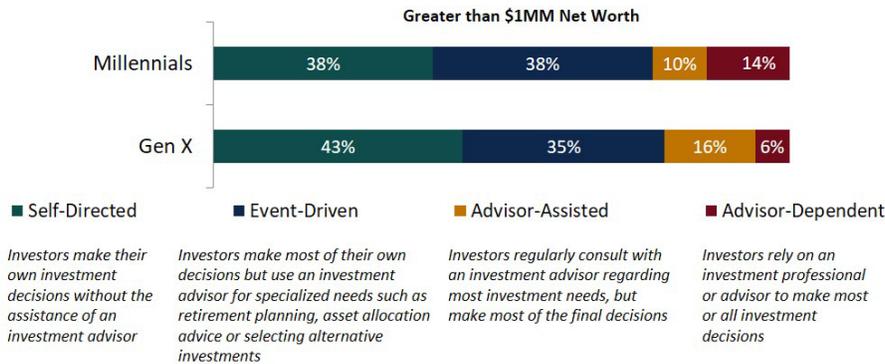
How to build trust and loyalty with two significantly different generations of investors.



You've seen the headlines: **"The Great Wealth Transfer Has Started"** *

As the Baby Boomer generation ages over the next several decades, a reported \$30 trillion in assets is forecast to be transferred to their Gen X and Millennial children. Advisors and providers face unprecedented challenges and opportunities to keep these assets "in-house."

Millennials and Gen Xers are primarily Self-Directed or Event-Driven investors who consult with a financial advisor about a specific life event. Whether they are wealthy due to an inheritance or their own making, Millennial and Gen X investors provide great opportunity for advisors.



This illuminating report profiles the Gen X and Millennial investors and provides invaluable insights that will help empower you to bridge the communication gap with the next generations of wealth :

- Who makes the financial decisions in these households? How do they differ from other generations?
- Do they presently work with a financial advisor? What type of financial advisor do they use?
- What situations would be most likely to compel them to consult with a financial advisor?
- How do Gen X and Millennial investors utilize online investment services? What do they expect from an advisor/provider regarding these capabilities?

*CNBC, January 13, 2015

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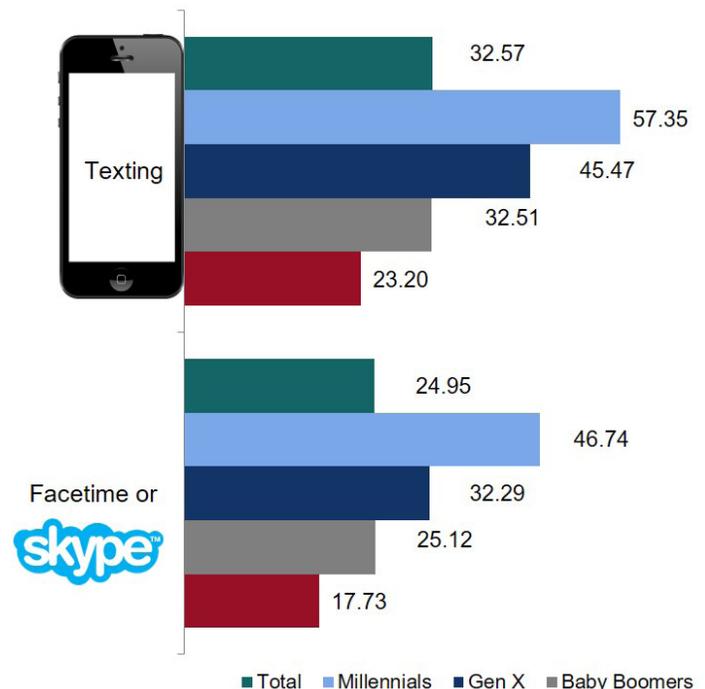
Build a Bridge to Future Clients

Gen X households are entering their prime earning years. Millennials are at the beginning of their careers. What do you need to know about the financial attitudes and behaviors that influence their investment and money management decisions?

What you'll learn inside this report:

- How Gen X and Millennial investors characterize their investment risk.
- How attitudes about financial advisors impact usage.
- The most effective method to contact a Gen X or Millennial investor for the first time.
- How the next generations of wealth define “trust” as it pertains to their financial advisor.
- Usage of social media for financial activities.
- The social media platform they would be most likely to use to interact with a financial professional.
- How technology-based solutions are impacting advisor interaction.
- What Gen X and Millennial investors consider to be the most effective educational outreach.

**Communicating With Advisor by the Following Channels
(0 = Would not like to communicate with advisor in this way, 100 = Would like to communicate with advisor in this way) - By Age**



Methodology:

Spectrem Group quantitatively surveyed roughly 250 Millennial and 250 Generation X investors with a household income of at least \$250,000 or a net worth of at least \$100,000 (not including their primary residence).

To order *Millennial and Generation X Investors: Attracting the Next Generations of Wealth* contact:

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