

## Marketing Financial Services to the Mass Affluent - US - December 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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"The affluent segment is multilayered, and all of its layers are of interest to the industry. Although the group is financially comfortable, they are not immune from financial concerns. They are, however, willing to use technology to help them manage their money."

— Robyn Kaiserman, Financial Services Analyst

### This report looks at the following areas:

- How can financial services companies attract young affluents?
- How do financial priorities and challenges change with household income?
- How are affluents doing with saving for retirement?

Affluent customers are quite often the most profitable customers for financial services providers. The challenge for the industry is that, as profitable as they may be, there aren't enough at the high end in terms of net worth to go around. Advisers and providers are therefore beginning to focus on mass affluents, the "low end" of the affluent market.

This report focuses on the challenges facing all affluents, from mass affluent to high net worth, and discusses ways advisers and providers can appeal to them and their specific needs. It also discusses what the affluent are seeking from their providers, giving both advisers and providers insight into how they can adapt their offerings and their messaging in such a way as to initiate conversations with this important segment.

This report builds on the analysis presented in Mintel's Mass Affluent and Financial Services—US, December 2012.

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### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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