

Lifestage Marketing in Financial Services - US - July 2018

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"There are many ways to define a lifestage, including by age, marital status, or parental status. The financial needs of each lifestage are unique and financial institutions are always seeking ways to customize products and services to appeal to each one."

- Chris Shadle - Financial Services Analyst

This report looks at the following areas:

While the recent recession affected everyone, it may have permanently altered the way Millennials, in particular, look at the financial world. This Report examines the differences in the financial goals of consumers at each lifestage, how they get information about financial services topics, what they are looking for from financial institutions, and how they make decisions on which institutions to use or not use.

- **Debt is the most pressing financial concern consumers face**
- **Lack of financial confidence is a serious issue, especially among women**
- **Consumers are not terribly responsive to brands' marketing channels**

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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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