

Affluent and High Net Worth Investing - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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"In the US, more and more consumers are joining the ranks of the affluent and high net worth investors. These individuals are not intimidated by investing, are committed to securing a comfortable retirement, and they prefer a responsive and available human touch when needed."

- **Chris Shadle, Financial Services Analyst**

This report looks at the following areas:

- As branch closures continue, banks need to consider the negative impact on suburban and rural investors
- Despite conceding on cost, robo-advisors are not popular among the investing elite
- Affluent and high net worth investors are not looking for new accounts

Most affluent and HNW (high net worth) individuals have sophisticated financial needs and concerns, and they prefer to use a human advisor, or else manage their finances themselves. While robo-advice is an attractive option du jour for the young affluent demographic, most investors are comfortable with their holdings and are not looking to open new accounts in the near future, thus putting a finer point on the importance of account management and relationship building.

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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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