Keeping me invested
Get to know your clients better

Why did I choose my financial advisor?

It is based on:

- 44% What investment offerings you have
- 43% What your tech offerings are
- 38% Your brand
- 35% Whether you were provided to my workplace
- 28% Any referral I received

What makes me decide to entrust more of my assets?

- 54% End-to-end digital platforms
- 52% An intuitive approach to products and services
- 47% An experience curated just for me

But I might switch to a new advisor...

If I’m a baby boomer (44%), gen X (47%) or gen Z (54%) I’m looking for a wider range or better investment product offerings.

- 56% High net worth customer

As a millennial (58%) or mass affluent investor* (56%) better technology will sway me.

- 55% With more than $500k to invest

How do you keep me as a client?

- 43% Improve your technology
- 42% Increase my knowledge with educational materials
- 42% Offer me a greater range of products and services for a discounted price
- 39% Get in touch with me proactively
- 28% Hold more regular meetings

Keeping me invested involves tailoring your products, services and experience to my needs.

Discover how Accenture can help you transform your advice, products and technology offerings.

Statistics in this document are based on Accenture’s 2021 North America Consumer Study. In this study, 1,000 wealth management consumers were interviewed across race, gender, wealth, education, location, profession, and age to understand what investors expect from their wealth managers regarding financial advice, products, and planning. All currently work with a financial advisor ranging from an asset manager, bank, RIA or a robo advisor.

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