

Keeping me invested

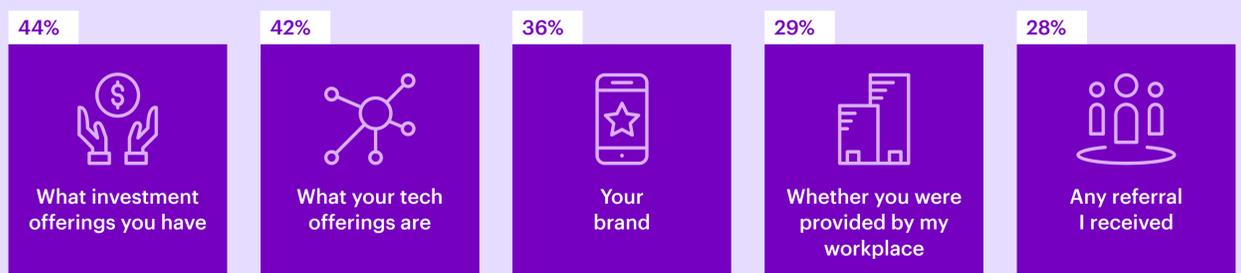
Get to know your clients better

Wealth Management Consumer Study

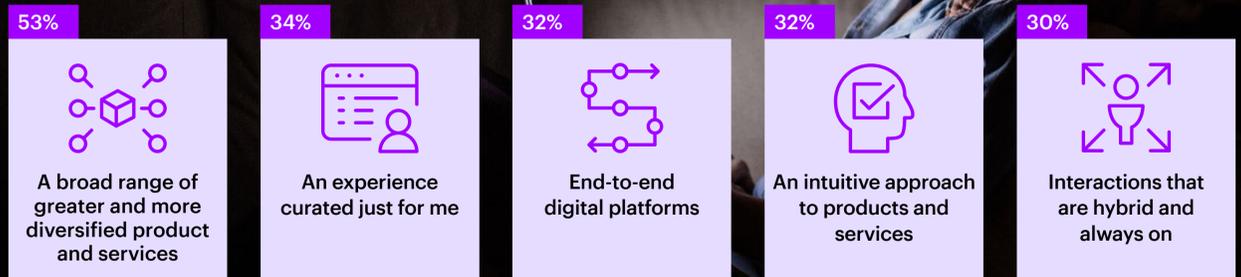


Why did I choose my financial advisor?

It is based on:

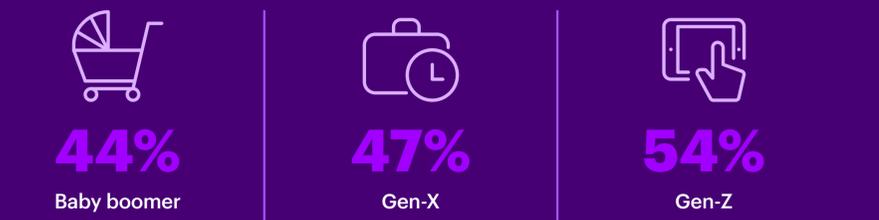


What makes me decide to entrust more of my assets?



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.



Being a high net worth customer (56%), with \$1M-\$10M to invest, I want a wider range and better product offerings, as well as improved technology.



With more than \$10m to invest (55%), I'm looking for a wider range or better investment product offerings.



As a millennial (58%) or mass affluent investor* (55%) better technology will sway me.



*Combined household wealth of \$250K to <\$1m

How do you keep me as a client?



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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