

THE NEXT GENERATION OF MILLIONAIRES™

Behaviors, Attitudes, and Perceptions of the Affluent Post-Boomer Investor

Cogent Research's The NeXt Generation of Millionaires examines the mindset of the affluent Generation X investor. Through profiling and identifying their behaviors, attitudes, and perceptions, Cogent provides an in-depth understanding of key brand perceptions of major distributors, mutual funds, variable annuity, and exchange-traded fund providers. The report also gives a comparison to older affluent investors, providing invaluable information on how they differ, and how they are changing the investor market place.

The GenX Mindset

How do the affluent GenX feel about risk and the current environment? What proportion of their assets are they comfortable managing on their own?

Asset Allocation and Product Mix

What products are GenX using, to what extent, and why? Where are they holding their assets, and what implications does that have for asset managers?

The Role of Advisors

Who uses an advisor and to what extent? How satisfied and loyal are GenX investors to providers? Why do some investors use advisors and have (will) their behaviors change?

Brand Equity and Momentum

Which brands dominate unaided consideration? What do awareness levels look like? Which providers are winning on share of wallet and which brands are at risk? What firms garner the greatest satisfaction and loyalty? What is driving specific brands' strengths –or weaknesses?

Value

The objective of this report is to help asset managers, product manufacturers, financial intermediaries and other financial services professionals maximize share of younger, affluent investors by:

What strategy will ensure you are minimizing your spend, yet still maximizing your impact?

- **Profiling** the affluent and High Net Worth Generation X investor in terms of investing behavior, product usage and allocation, and dependence on advisors
- **Identifying** the strongest drivers of provider loyalty and how they differ from those of Boomers and older investors
- **Providing** an in-depth understanding of key brand perceptions and loyalties among distributors, mutual fund, variable annuity, and exchange-traded fund providers

Methodology. Data was collected via a web-based survey of a representative sample of over 650 GenX investors in the US, with investable assets of \$100,000 or more.

Data was collected in October 2009.

Pricing. \$7,500

To order report or for more information:

Contact us at info@kogentresearch.com or 617-715-7641

How do you position yourself to capture the assets of this growing generation of millionaires?

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