

Wealth in US Market 2017 Share, Trend, Segmentation and Forecast to 2020

Wealth in US Global Market Share, Opportunities, Segmentation and Forecast to 2022

PUNE, INDIA, March 3, 2017

/EINPresswire.com/ -- Summary

“Wealth in the US: HNW Investors” report analyzes the investing preferences and portfolio allocation of US HNW investors. The report is based on our proprietary Global Wealth Managers Survey.



WISE GUY
REPORTS

Norah Trent Partner Relations & Marketing Manager

✉ sales@wiseguyreports.com

☎ Ph: +1-646-845-9349 (US) Ph: +44 208 133 9349 (UK)

🌐 <https://www.linkedin.com/company/4828928>

🐦 <https://twitter.com/WiseGuyReports>

📘 <https://www.facebook.com/Wiseguyreports-1009007869213183/?fref=ts>

Wise.Guy.

The US is the largest wealth market in the world, and home to a diverse and sizable HNW segment. As the population continues to age, building ties with younger generations will ensure the successful transfer of wealth to beneficiaries. The range of countries of origin among HNW expats in the US is diverse, with the majority from China and the UK. Over one third of client investment portfolios are allocated into equity investments, and with continued market uncertainty expected in the future, greater importance is placed on cash holdings.

GET SAMPLE REPORT @ <https://www.wiseguyreports.com/sample-request/1015967-wealth-in-the-us-hnw-investors> □

Specifically, the report -

- Profiles the average US HNW investor in terms of their demographics and analyzes the expat opportunity in the US.
- Analyzes which wealth management mandates are preferred among US HNW investors and how the demand will develop looking forward.
- Examines the allocation of US HNW investors' portfolios into different asset classes and how the allocation is expected to develop in the future.
- Analyzes the product and service demand among US HNW investors.

Scope

- 38.2% of US HNW individuals have gained wealth either as family business owners or as first-generation entrepreneurs. As these sources of wealth continue to increase in importance, greater demand is expected for personalized wealth management services.
- The majority of HNW investments are held in discretionary mandates. However, wealth managers expect growing demand for execution-only asset management and automated investment services in the next two years. This is reflective of some clients preferring a higher level of involvement in their investment choices.
- Equities are the main constituent of a US HNW investment portfolio, representing nearly half of an average US HNW portfolio. Though cash investments make up just 5.1% of an average HNW portfolio, they are gaining importance.
- Among planning services, financial planning shows the strongest demand. But wealth managers will do well to provide a complete suite of tax planning services, as 68.9% expect demand for these services to increase in the near future.

Reasons to buy

- Develop and enhance your client targeting strategies using our data on HNW profiles and source of wealth.
- Give your marketing strategies the edge required and capture new clients using insights from our data on HNW investors' drivers for seeking investment advice vs self-directing.
- Tailor your investment product portfolio to match the current and future demand for different asset classes among HNW individuals.
- Develop your service proposition to match the service and product demand expressed by US HNW investors and react proactively to the forecasted change in demand.

Table of Content: Key Points

Executive Summary

1.1. US HNW clients prefer custom and discretionary approaches to wealth management

1.2. Key findings

1.3. Critical success factors

2 Profiling the US HNW Investor

2.1. Earned income accounts for the largest proportion of US HNW wealth

2.2. Expats in the US are a small but important segment

3 US HNW Investment Style Preferences

3.1. US HNW investors prefer their wealth professionally managed

3.2. US HNW individuals prefer their portfolios to be managed by a professional

4 Understanding Asset Allocation Trends among US HNW Investors

4.1. Current asset allocation is heavily weighted towards equities

4.1.1. Equity and alternative investments dominate HNW portfolios

4.1.2. Equity investments make up nearly half of US HNW portfolios

4.1.3. US HNW investor portfolios display noticeable demand for bond investments

4.1.4. HNW individuals shift assets away from cash investments

4.1.5. HNW client portfolios allocate a minimal proportion of wealth to property investments

4.1.6. Commodity investments are of little interest to US HNW clients

4.1.7. Alternatives constitute 7% of the typical HNW portfolio

5 US HNW Product and Service Demand

5.1. Planning services are in high demand in the US

5.1.1. Inheritance planning presents an opportunity for wealth managers to resonate with recipients

5.1.2. A holistic approach to providing wealth management services is key for resonating with the US HNW market

...Continued

ACCESS REPORT @ <https://www.wiseguyreports.com/reports/1015967-wealth-in-the-us-hnw-investors>

Get in touch:

LinkedIn: www.linkedin.com/company/4828928

Twitter: <https://twitter.com/WiseGuyReports> 

Facebook: <https://www.facebook.com/Wiseguyreports-1009007869213183/?fref=ts>

Norah Trent

wiseguyreports

+1 646 845 9349 / +44 208 133 9349

[email us here](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/369226764>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2021 IPD Group, Inc. All Right Reserved.