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

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

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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.

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.

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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

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
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