

New Spectrem Group Study Reveals the Wealthiest U.S. Investors Are Becoming Younger and Their Numbers are Growing

CHICAGO, USA, January 22, 2019 /EINPresswire.com/ -- A new Spectrem Group study, [The Wealthiest Americans: \\$25 Million Plus Investors](#), offers insights into the changing face of wealth in America, as a long-anticipated generational transfer of wealth moves forward. The report shows steady expansion in the number of American households reporting net worth exceeding \$25 million following the Great Recession. It also reveals how the average age of wealthy households in the U.S. is trending downward, as GenX and Millennial investors begin to amass great personal wealth from successful careers and/or sizeable inheritances.



Other key findings from the Spectrem report include:

- In addition to being younger than ever before, with the mean age of \$25 million plus investors dropping 11 years since 2014 to 47 years old in 2018, American households with net assets of \$25 million or more include more females than previously.
- Having built their wealth during the longest bull market in U.S. history, younger investors expect much higher returns than their older counterparts, with 74 percent of those under the age of 37 considering anything under 10 percent annual returns unacceptable.
- More than 40 percent of the wealthiest investors contribute at least \$25,000 to charity each year.

“The vast generational transfer of wealth to younger investors outlined in this report is just beginning, and will require the financial services industry to stay closely attuned to the unique expectations and motivations of Millennial and GenX investors,” said Spectrem President George H. Walper, Jr. “These younger, well-educated and savvy investors express less loyalty to traditional providers, require communication through digital channels and are more interested than previous generations in ESG (Environmental, Social and Governance) investments that can benefit the world while delivering attractive returns. Providers that can tailor their approach to meet these needs will be the most successful in managing the shift.”

Additional insights from the report, which also includes information about the asset allocation, product ownership, future investment intentions and spending habits of \$25 million plus investors, are available on Spectrem’s website.

About Spectrem Group: Spectrem Group (www.spectrem.com) strategically analyzes its ongoing primary research with investors to assist financial providers and advisors in understanding the Voice of the Investor.

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