The modern affluent investor:

- Refers to individuals between the ages of late 20s and early 40s, or Millennials
- Tends to be digitally savvy and prefer self-directed approach in wealth management, but appreciates advisory for more sophisticated investments
- Wants easy access to quality insights as they are time-starved
- Has increasing exposure to cash equities and equity-linked structured products
- Understands the need for diversification in portfolio management
- Grew wealth by being successful entrepreneurs, climbing corporate ladder, family inheritance, or early investors in crypto

BT Graphics