Financial Concerns and Priorities of America’s Wealthy Investors

HOW ARE INVESTORS FEELING?

53% of HNWI
75% of UHNWI
are optimistic about the economic outlook for 2021*

WHAT GOALS ARE IMPORTANT TO THEM?

34% of HNWI & 65% of UHNWI
have increased their investments due to Covid-19*

72% of HNWI & 87% of UHNWI
feel knowledgeable about financial and investment planning*

WHAT ARE THEY WORRIED ABOUT?

34% of HNWI
50% of UHNWI
are concerned about healthcare and medical expenses*

WHAT INVESTMENT STRATEGIES ARE TOP OF MIND?

48% of HNWI
75% of UHNWI
cite minimizing estate taxes as being important**

HOW ARE INVESTORS FEELING?

34% of HNWI & 49% of UHNWI
are concerned about leaving an inheritance for family/ heirs*

23% of HNWI
59% of UHNWI
agree that the best advice right now is to make little or no changes to their portfolio and plans*

20% of HNWI
41% of UHNWI
are worried about their long-term financial security due to Covid-19*

40% of HNWI
56% of UHNWI
are concerned about leaving an inheritance for family/ heirs*

WHAT ARE THEY WORRIED ABOUT?

18% of HNWI & 41% of UHNWI
are worried about their long-term financial security due to Covid-19*

WHAT GOALS ARE IMPORTANT TO THEM?

38% of HNWI
66% of UHNWI
say that giving to charities is an important financial goal**

23% of HNWI & 72% of UHNWI
indicate that planning for wealth transfer is an important goal for 2021***

WHAT INVESTMENT STRATEGIES ARE TOP OF MIND?

48% of HNWI
59% of UHNWI
say it’s important to consider alternative investments***

34% of HNWI & 65% of UHNWI
have increased their investments due to Covid-19*

23% of HNWI & 59% of UHNWI
say it’s important to consider alternative investments***

40% of HNWI & 56% of UHNWI
agree that the best advice right now is to make little or no changes to their portfolio and plans*

WHAT ARE THEY WORRIED ABOUT?

40% of HNWI
56% of UHNWI
are concerned about healthcare and medical expenses*

WHAT GOALS ARE IMPORTANT TO THEM?

38% of HNWI
66% of UHNWI
say that giving to charities is an important financial goal**