

UNDERSTANDING TODAY'S AFFLUENT INVESTOR

Keeping affluent investors satisfied and earning a greater share of wallet isn't a matter of luck. Run the numbers to see what makes affluent clients stick around—and how you can up your game.

CURRENT SATISFACTION



84%

of affluent clients consider their financial advisor as their primary financial professional

42%

of affluent clients are "very satisfied" with their advisors

30%

of affluent clients have entrusted their advisor with 3/4 or more of their investable assets

THE FUNDAMENTALS

58%

of affluent clients meet with their advisor two times a year or less

15%

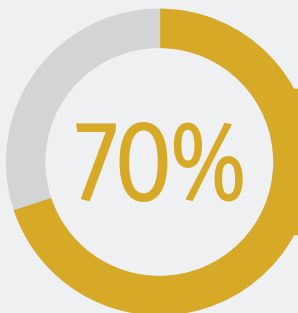
never met with their advisor in the past year at all!



Most advisors are not even executing on the fundamentals.

THE IMPORTANCE OF A SOCIAL RELATIONSHIP

Social interaction with your clients leads to higher satisfaction and loyalty: the stats say it all. Additionally, social contact with your affluent clients can uncover prospects from within their spheres of influence.



70%

of affluent clients report only a purely business relationship with their financial advisor

56%

were introduced to their advisor by a friend, family member or professional

73%

of business-only clients would be willing to make a personal introduction

86%

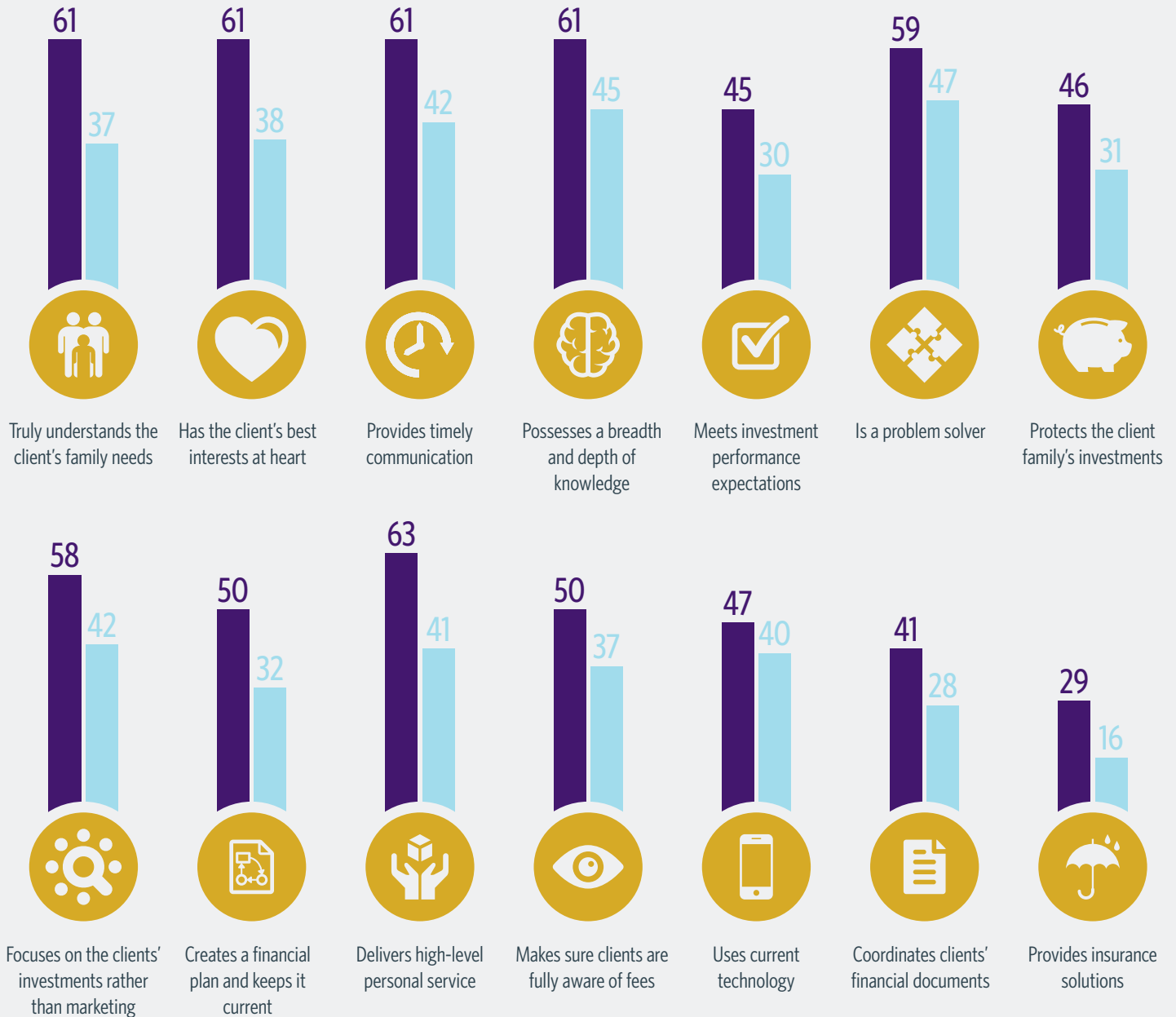
of affluent clients who have a business and social relationship would do the same

get all the details in the white paper at ceteraadvisors.com/affluent



THE 14 AFFLUENT COMMANDMENTS

All financial advisors are challenged in meeting affluent expectations. However, there is a significant gap between advisors who have both business and social interactions and those who only have business relationships.



Now that you know the score, remember that your social skillset can be as important as your business acumen when it comes to keeping affluent clients satisfied and growing your business.

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