

# Wealthy in America: An Eye-Opening Portrait of Today's Affluent Investors and Families

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READY FOR YOUR BEST YEAR EVER?



IF SOMEONE ASKED YOU WHAT A TYPICAL AFFLUENT CLIENT LOOKED LIKE, WHAT WOULD YOU TELL THEM?

The affluent can be very different from those with more moderate wealth. To effectively serve the wealthy, you need to understand who they are and their demographics so you can know how to best add value to their lives.

Of course, concrete knowledge about the affluent can be elusive—making it tough for advisors to understand this group's most important attributes.

That's exactly why we closely and carefully examined some of the key traits and characteristics of today's affluent families—to give you the power to attract and serve the affluent well, and help them achieve the results they want.

Here's what we discovered that will help you attract the affluent.

Get the 411 on today's affluent investors and families!

## Key Takeaways:

- There are three distinct levels of affluence—one of which is the sweet spot for most advisors.
- Focus on Boomers and entrepreneurs to get in the path of money.
- The desire to give back via philanthropy is strong.

RESULTS-DRIVEN WEBINAR



Seven Key Strategies to Attract a Steady Stream of Affluent Entrepreneurs

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YOUR BEST YEAR EVER

Get the 411 on today's affluent investors and families!

FREE EBOOK

