

A RECENT MORGAN STANLEY STUDY SHOWED THE FOLLOWING:

WHO ARE THE "NEXT GEN?"

The survey targeted people under the age of 40 who stand to inherit wealth of \$25 million or more.

Half the inheritors come from families with wealth of more than \$100 million.



NEXT GEN VALUES

Most participants share their families' values. Millennials born between 1982 and 2000 are especially idealistic.

63% of millennials view themselves as stewards of their wealth for future generations

60% view their wealth as a vehicle to help the community

95% say they recognize what is important to their families

INVESTING THROUGH NEXT GEN LENS

75% Start learning about investments in their late teens or 20s

59% Believe mobile trading platforms are important

86% Invest in stocks or bonds

59% Trade online

MANAGING WEALTH THE OLD-FASHIONED WAY

63% Believe working with advisors is necessary to make sound financial decisions

49% Say they are very likely to continue working with their parents' advisors

82% Want more in-person engagement with their financial advisors

74% Want to do more business via phone

68% Want more e-mail communication

15% Want more social media interaction

5% Want more communication via internet video/Skype

FINANCIAL MILESTONES

