

2018 U.S. High Net Worth, Asset Management Opportunities



RESEARCH OVERVIEW

Industry professionals can participate in Cerulli research through either topical research interviews or confidential surveys. In return, participants receive research findings or benchmarking reports for their participation. All information is aggregated to protect the anonymity of specific firms and respondents. Data collected is used across all Cerulli products.

TARGET AUDIENCE

All Asset Managers and ETF Sponsors currently, or looking to, partner with HNW-focused intermediaries, including family offices, wirehouses, RIAs, private banks, and trust companies.

LAUNCH

3Q 2018

SURVEY OVERVIEW

This study gathers trends as it relates to partnering with high-net-worth (HNW) and ultra-high-net-worth (UHNW) intermediaries and investors. Highlights include product demand, distribution of resources, engaging centers-of-influence, the costs of doing business, and most effective distribution strategies.

This Initiative Explores these Key Industry Trends

- Best practices when partnering and engaging with centers-of-influence
- Products and services in highest demand among HNW individuals
- How asset managers are structuring and evolving their distribution strategies to more effectively address the needs of sophisticated wealth managers and advisory practices

HOW TO PARTICIPATE

1. Register

Contact us or click the "Register Now" button below

[REGISTER NOW](#)

2. Complete

Interview participants

Research interviews will take 30–60 minutes to complete

Survey participants

Survey length varies, but typically takes 10–20 minutes to complete

3. Receive

Interview participants

Key Findings: Overview of the findings from our upcoming 2018 High-Net-Worth and Ultra-High-Net-Worth report

Survey participants

Complimentary Research: A copy of a relevant issue of The Cerulli Edge

Benchmarking Report: Custom report of this survey highlighting your firm's responses in comparison to the survey aggregate

CONTACT US

For more information about this research initiative, contact: surveys@cerulli.com

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