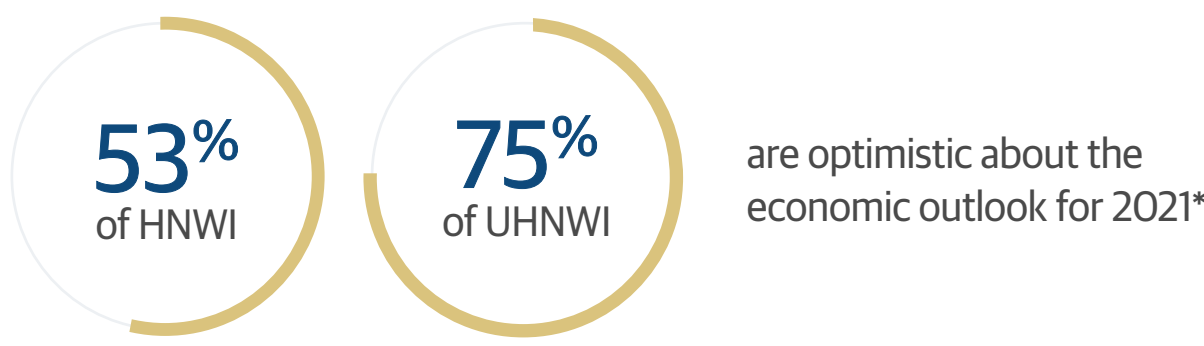


# Financial Concerns and Priorities of America's Wealthy Investors

## HOW ARE INVESTORS FEELING?



For the purposes of this data, High Net Worth Investors (HNWI) are defined as those surveyed with \$2M-\$9.9M in assets. Ultra High Net Worth Investors (UHNWI) are defined as those with \$10M+ in assets.

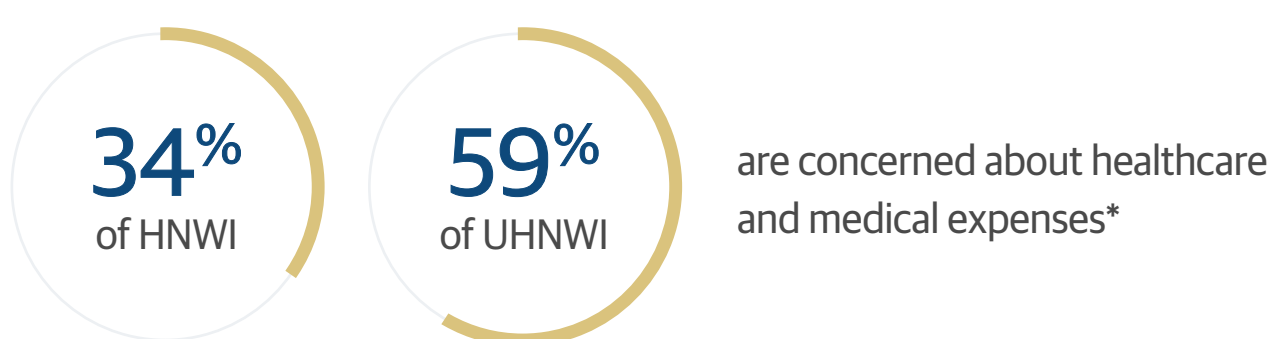


**34% of HNWI & 65% of UHNWI** have increased their investments due to Covid-19\*



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

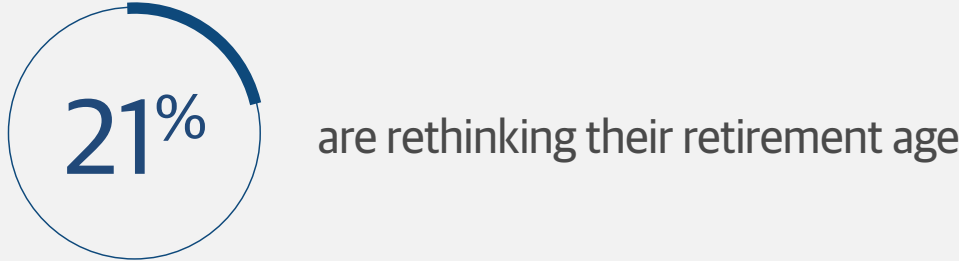
## WHAT ARE THEY WORRIED ABOUT?



**20% of HNWI & 49% of UHNWI** are concerned about leaving an inheritance for family/heirs\*



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

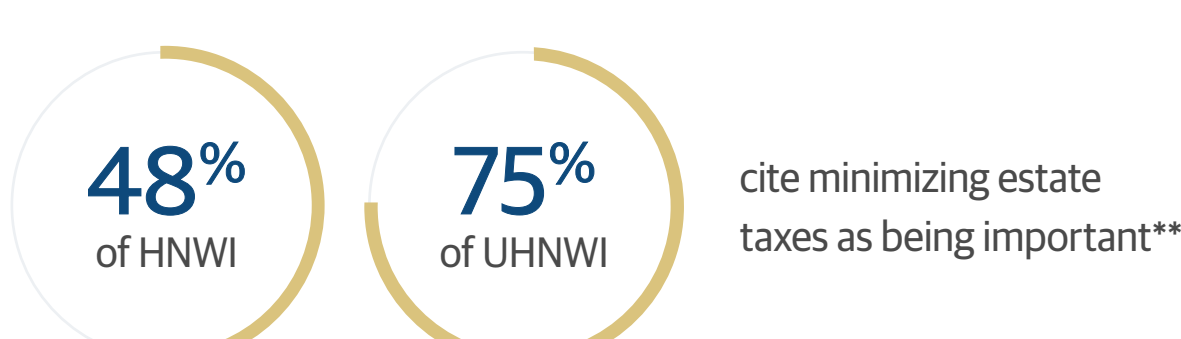


## WHAT GOALS ARE IMPORTANT TO THEM?



**33% of HNWI & 72% of UHNWI** indicate that planning for wealth transfer is an important goal for 2021\*\*

## WHAT INVESTMENT STRATEGIES ARE TOP OF MIND?



**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\*

\* Agreement is completely/strongly agree on a 5-point scale.

\*\* Importance is extremely/very important on a 5-point scale.

Based on the results of a nationally representative sample of 500 U.S. consumers, ages 25 to 70 with at least \$2M in investable assets who completed an online Northwestern Mutual survey in first quarter 2021.

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