

Understanding a woman's needs and concerns is key to building a relationship

based on trust, no matter what she's going through.

Be the partner she needs to navigate financial challenges stemming from divorce, caregiving, widowhood, or other situations.

\$14 trillion

of personal wealth in the U.S. is controlled by women²

32%

of women who left a financial advisor did so because the advisor didn't listen or wasn't trusted⁴

Did you know...

Women are the **fastest growing wealth segment**

in the U.S.¹

...and that...

Meanwhile...

90%

of women want to learn more about financial planning and investment choices³

But because they often feel misunderstood...

...which means...

The financial services industry is **missing out** on an estimated **\$700 billion**⁵

We have resources you can use to start the conversation with women at any stage in life.

Check out our toolkits and checklists.

¹ "Women as the next wave of growth in US Wealth Management," by Pooney Baghai, Olivia Howard, Lakshmi Prakash, and Jill Zucker, McKinsey & Company, July 29, 2020.

² "Women & Investing Analytical Report," New York Life Investments, April 2019.

³ "Fidelity Investments Survey Reveals Only Nine Percent of Women Think They Make Better Investors than Men," Fidelity, May 18, 2017.

⁴ The MetLife Study of Finances and Female Executives, November 2010.

⁵ "Serving Women as Financial Services Customers: Women in Financial Services 2020," OliverWyman.com