

**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 women<sup>2</sup>

**32%**

of women who left a financial advisor did so because the advisor didn't listen or wasn't trusted<sup>4</sup>

Women are the **fastest growing wealth segment**

in the U.S.<sup>1</sup>

**90%**

of women want to learn more about financial planning and investment choices<sup>3</sup>

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

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

**Check out our toolkits and checklists.**

<sup>1</sup> "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.

<sup>2</sup> "Women & Investing Analytical Report," New York Life Investments, April 2019.

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

<sup>4</sup> The MetLife Study of Finances and Female Executives, November 2010.

<sup>5</sup> "Serving Women as Financial Services Customers: Women in Financial Services 2020," OliverWyman.com