



# WOMEN INVESTORS

## KEY INSIGHTS



### Women approach the investment market differently than men

- Less invested, both emotionally and financially
- Financial “wins” are defined as meeting milestones (i.e., paying off a car) rather than market achievements
- This may evolve as Millennial women become involved in, and open to, investment options and tools



### Meet women where they are with information and messaging

- Clear, concise, and actionable steps to help them start successfully and gain confidence
- Emphasize the idea that command of finances yields more choices for themselves and their family
- “Ladder up” communications based on where they are in their financial journey, giving more information as they gain confidence
- Don’t assume they know where to turn for help; many need guidance to find a trusted paid financial advisor

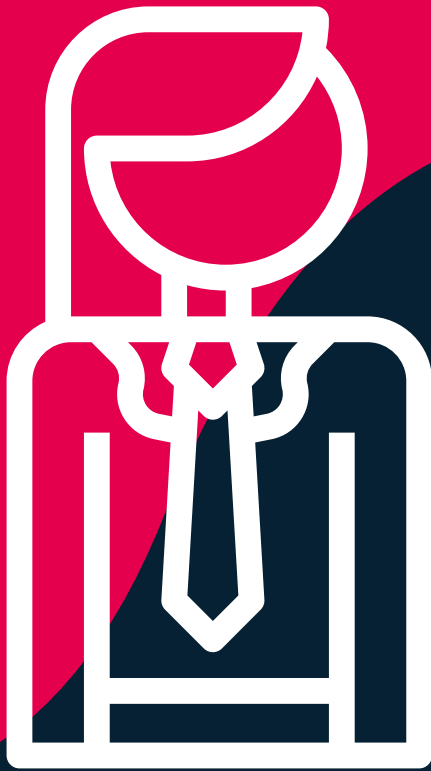


### Do not explicitly single out women in messaging or materials

- Women-centric language (e.g. designed just for women) is perceived as a negative and will not engage this group

# CUSTOMER PERSONA | WOMEN INVESTORS

AGE: 30-40 | INCOME: 50K-120K



## ATTITUDES

- Less invested, both emotionally and financially than men
- Financial “wins” are defined as meeting milestones (i.e., paying off a car) rather than market achievements
- Disciplined savers, less impulsive investors than men

## MESSAGING

- Clear, concise, and actionable steps to help them start successfully and gain confidence
- Emphasize the idea that command of finances yields more choices for themselves and their family
- “Ladder up” communications based on where they are in their financial journey, giving more information as they gain confidence

## TIPS

- Do not explicitly single women out in messaging or materials
- Women-centric language is perceived as a negative and will not engage this group \*The “designed just for women” approach is unlikely to be successful in the investing arena
- Don’t assume they know where to turn for help; many need guidance to find a trusted paid financial advisor