

HSBC Private Bank Decision Makers

I TARGET:

HSBC Private Bank Customers

I MARKET:

US, UK, Mexico,
HK, China, UAE

I METHODOLOGY:

3-Day, Mobile/online ethnography (30-
minutes per day)

SPECS:

- **The Dutiful Child** - the 2nd/3rd generation having to take over the family businesses which they have low understanding of and low passion for. They will do what's best for the family.
- **The Wealth Warrior** - Natural apprentices to the family business. Studied in preparation for taking a lead role later. Financially sophisticated. Looking to protect the wealth of family
- **The Independent** - desperate to make their own way in life and not to be controlled by "the money" or "the family." Put their own interests first
- **The Reluctant Millionaire** - career-focused and time-poor. Typically the 2nd generation. They become a professional rather than work with their parents and understand the wealth
- **The Hunter** - He/she is looking to be in control always and 'hunts' for the wealth/achievements in his life. He/she is always looking to reach for the next thing
- **The Delegator** - He/she is most comfortable delegating the management of the family wealth to someone. Cherishes work-life balance and instead, likes to focus on self-development
- **The Patron** - Polymaths and dreamers who are creative and caring. Driven by a desire to make a difference in the world with their wealth
- **The Gatherer** - All he/she does is for the family, protecting and enjoying a secure future for others and hence, tends to struggle with work-life balance. It takes a long time to build trust

SAMPLE PROFILES:

- President at RVP Capital
- IT Director at Johnsons
- COO at Libertventures COO at MGI
- CMO at Xybion