

High Net Worth Investors

| TARGET:

High Net Worth Investors

| MARKET:

UK

| METHODOLOGY:

20 Minute Survey

SPECS:

Ages 30-65

Mix of Schwab and Non-Schwab customers

Audience 1: Ultra High Net Worth investors (UHNW) – investable assets of

\$10M+ Audience 2: High Net Worth investors (HNW) – investable assets of

\$1M – \$9M Audience 3: Affluent Driven investors – investable assets of \$250K

\$999K

