innovate MR + IVY EXEC

Highly Affluent Individuals

TARGET:

Highly Affluent Individuals

MARKET:

CA, WA, OR

METHODOLOGY:

90 - Minute Online Focus Group

SPECS:

Affluent ($1M to less than $5M in investable assets)
High Net Worth ($5M+ in investable assets)
Their household's savings and investments, including:

Deposit and savings accounts, cash and money market accounts, exchange-traded funds (ETFs) mutual funds, stocks, bonds, annuities, a personal IRA or Keough account.

This does not include retirement accounts such as 401Ks, 403Bs, profit sharing, IRA-SEPs, stock purchase/ESOP, money purchase plans, business accounts, life insurance, or the value of your home

- Cash & Money Market Accounts
- Stocks
- Bonds
- Mutual Funds
- EFT's - Annuities
- Deposit/Savings Accounts
- Taxable & IRA Accounts

SAMPLE PROFILES:

- Experienced CEO, CFO and Board Member of Public and Private Companies in the U.S. and U.K. Former investment banker
- Head of Data Science and Innovation at LiveRamp
- Executive Director at The Walt Disney Company
- VP at Rocket Dog Footwear
- Owner at Kaizen Development

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IVY EXEC

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