

# Ultra-High Net Worth Decision Makers

## | TARGET:

Ultra-high Net Worth  
Individuals

## | MARKET:

US

## | METHODOLOGY:

45-Minute Telephone/ Web IDs

## SPECS:

Ultra-high net worth category (\$16 Million - \$25 Million in assets)

They must not be advised by Vanguard

They can't work for a financial planning company

Age 22-77

All must be primary or share responsibility in their household's financial and investment decisions

Approximate total value of their household's investable assets \$5,000,000 - \$25,000,000

Must be at least somehow comfortable about discussing their experiences with and opinions about wealth management and investment products they are currently using

## SAMPLE PROFILES:

- Executive Advisor at BCN Telecom
- Regional Partner at Yard Ventures
- Owner at Atlas Corporate Governance
- CIO at Satellite
- VP at Northwell Health
- VP at Northwell Health
- CEO of The Perkins Group, Inc.
- President at Kalani Capital Management, LLC

### Contact us

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