

Top nine reasons wealthier clients sign up with Registered Investment Advisers

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9. Better manage market risk: 1.9%*



*Percentage of HNW households nationwide that indicated this was their most important financial goal Source: Cerulli Associates, Phoenix Marketing International

8. Improve household cash flow 1.9%*



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7. Minimize income and capital gains taxes 2.4%*



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6. Charitable giving 4.2%*



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5. Leave an estate for heirs 9.8%*



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4. Aggressively grow wealth 14.0%*



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3. Protect current level of wealth 14.6%*



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2. College education financing 19.6%*



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1. Maintaining lifestyle in retirement 31.7%*



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