

The future of women's wealth

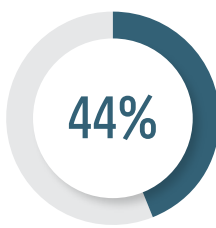
When it comes to financial planning, women need a partner who understands them.

FIDELITY WEALTH MANAGEMENT - 03/01/2022 - 2 MIN READ



By 2030, women are expected to control much of the \$30 trillion in financial assets that baby boomers will possess.¹ Already, women make up an increasingly large share of millionaires in the US and around the world.

44% of millionaires across the world are female.²

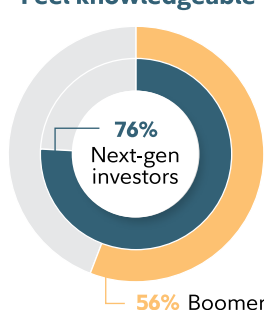


44% of ultra-high-net-worth individuals in the US are female.³

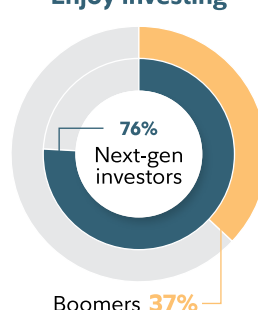
Millionaire women from Gen X, Y, and Z are forging a different relationship with investing than the preceding generation.⁴



Feel knowledgeable



Enjoy investing



Still, financial advisors often fail to take women's needs into account or offer them the right kind of support.

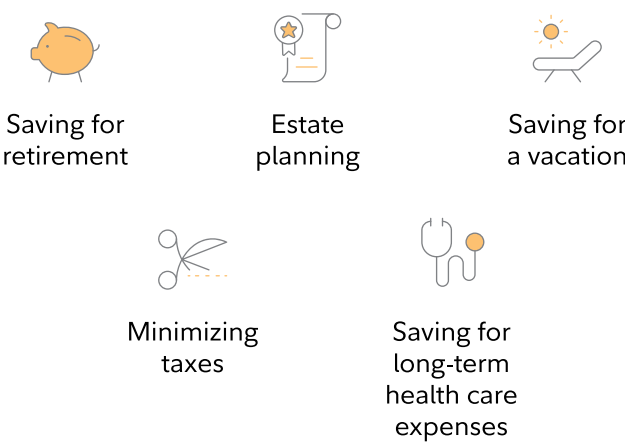
During the pandemic, women were less satisfied with how their advisor helped address their concerns.



"Women are pulled in many different directions. They can be mothers, caregivers, business owners—sometimes all of the above—and often feel like they don't have the time to devote to developing a financial plan. When seeking advice, it's critical that they find someone they trust, who understands what's really important to them and can help them reach their financial goals."

PAMELA PIRONE-BENSON
Vice President, Advanced Planning

Men and women share many of the same financial goals.

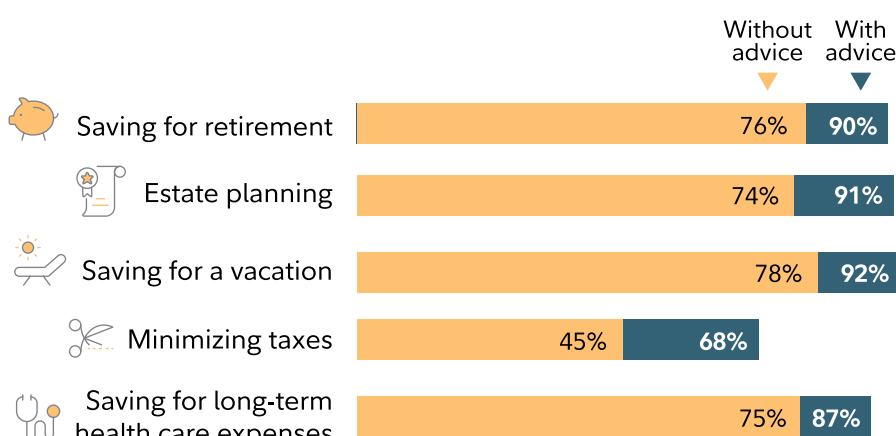


More than 75% of women want their investments to better align with their personal values.

But women investors are less likely to have a formal financial plan, and as a result are more likely to experience challenges related to unforeseen expenses and unpredictable income.



Investors who get professional financial advice are more likely to feel confident about achieving their goals.



At Fidelity, we believe it's important for women to engage as early as possible in the financial planning process, so they can take the necessary steps to help secure their financial future.

For more on how to develop a thoughtful plan for your wealth and the latest on the markets, taxes, and more, visit [Fidelity.com/Insights](https://www.fidelity.com/insights).

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Unless otherwise noted, all information within is from the 2021 Fidelity Investor Insights Study. Conducted between May 15 and June 7, 2021, it surveyed a total of 1,974 investors, including 773 millionaires. The study was conducted via a double-blind online survey.

- "Women as the next wave of growth in US wealth management." Pooneh Baghai, Olivia Howard, Lakshmi Prakash, and Jill Zucker. McKinsey & Company. July 29, 2020.
- "World Wealth Report 2020," CapGemini, 2020.
- "Distribution of Ultra-High Net Worth Individuals in the United States in 2019, by Gender," Statista, January 20, 2021. Note: ultra high net worth = those with over \$30 million in investable assets.
- Fidelity defines Gen X, Y, and Z as those between the ages of 21 and 56 years old.
- Fidelity Investor Insights Study 2016.

Investing involves risk, including risk of loss.

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This information is intended to be educational and is not tailored to the investment needs of any specific investor.

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