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FEATURING

- Angie O'Leary, RBC Wealth Management
- Cyndy Ranzau, RBC Wealth Management
- Cathy Walker, RBC Wealth Management
- Betsy Erickson, Arabella Advisors

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How Financial Advisors Can Attract Next Gen Investors

SEPTEMBER 13, 2022 • DEVON DREW

Spot on with popular beliefs, the next generation of investors have no problem choosing robo investment advisors when managing their money, however they also see value in human interactions in regard to how their financial advice is delivered. Vanguard surveyed 1,500 clients and found robo-advisors were preferred for tasks that could be automated whereas human advisors were the preference for activities requiring advice. The same study, given across several generations investors, uncovered similar results for financial advice.

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