



Wealth in Canada Market 2017 - Opportunity, Driving Trends and deep study.

Wealth in Canada Market Share, Opportunities, Segmentation and Forecast to 2022

PUNE, INDIA, August 10, 2017 /EINPresswire.com/ -- Pune, India, August 2017: WiseGuyReports announced addition of new report, titled "[Wealth in Canada: HNW Investors 2017](#)".

Summary

"Wealth in Canada: HNW Investors 2017", report analyzes the investing preferences and portfolio allocation of HNW Canadians. The report is based on our proprietary Global Wealth Managers Survey.

The HNW market in Canada is dominated by family business owners and expat clients drawn from Asia Pacific and the US. These busy owners prefer discretionary asset management and have little desire to try other options. As cautious investors they favor classic investments such as equities and bonds, investing little into less liquid assets such as property and commodities. Tax is a major issue for the domestic wealth market and a key driver for booking offshore. There is currently strong and growing demand for financial and pension planning.

GET SAMPLE REPORT @ <https://www.wiseguyreports.com/sample-request/1705951-wealth-in-canada-hnw-investors-2017>

Specifically the report -

- Profiles the average HNW investor in Canada in terms of their demographics and analyzes the expat opportunity.
- Analyzes which wealth management mandates are preferred among HNW investors in Canada and how demand will develop going forward.
- Examines the allocation of HNW investors' portfolios into different asset classes and how this will develop in the future.
- Analyzes product and service demand among HNW investors in Canada.

Scope

- The majority of HNW individuals in Canada have accumulated their wealth through first-generation entrepreneurship and family businesses.
- Expats, particularly those from China and the US, represent a large part of the HNW market.
- Canadian HNW investors heavily favor equities, followed by the fixed income security of bonds.
- HNW individuals show a strong and enduring preference for discretionary asset management.
- Led by financial planning, HNW investors show strong demand for all planning services.

Reasons to buy

- Develop and enhance your client targeting strategies using our data on HNW profiles and sources of wealth.
- Give your marketing strategies the edge required and capture new clients using insights from our data on HNW investors' drivers for seeking investment advice vs self-directing.
- Tailor your investment product portfolio to match current and future demand for different asset

classes among HNW individuals.

- Develop your proposition to match the product and service demand expressed by HNW investors in Canada and react proactively to any forecasted changes.

Table of Content: Key Points

1. EXECUTIVE SUMMARY 3

1.1. Canadian HNW individuals are concentrated among business owners 3

1.2. Key findings 3

1.3. Critical success factors 3

2. PROFILING HNW CONSUMERS IN CANADA 8

2.1. Family business is the dominant source of Canadian HNW wealth 8

2.1.1. Dedicated programs targeting female HNW investors are a must 8

2.1.2. Entrepreneurs are also a lucrative target market 9

2.1.3. Many HNW investors have built their fortunes through property 12

2.2. Expats are a large and important target group in Canada 13

2.2.1. Expats constitute almost 18% of the resident HNW population, making it important for wealth managers to comply with CRS rules 13

2.2.2. Friendly visa conditions encouraged migration of the rich, although this route was closed in 2014 14

2.2.3. Chinese and US individuals represent the bulk of the HNW expat population 15

3. HNW INVESTMENT STYLE PREFERENCES 17

3.1. Wealth managers must lead with a discretionary offering 17

3.1.1. There is a significant benefit to being the lead wealth manager in Canada 17

3.1.2. The convenience factor has to feature in every wealth manager's marketing campaign 18

3.1.3. The majority of HNW wealth is kept in discretionary mandates 19

3.1.4. A strong advisory capability is also beneficial in Canada, with 35% of HNW investors exhibiting strong demand 21

3.2. Lack of time and expertise is driving demand for advisory and discretionary mandates 22

3.2.1. Demand will remain largely flat across the various different mandate types 22

3.2.2. Lack of time and knowledge mean discretionary mandates will maintain their leading position 23

3.2.3. HNW investors' desire for non-financial assets drives self-investment 24

4. UNDERSTANDING ASSET ALLOCATION TRENDS AMONG HNW INDIVIDUALS IN CANADA 27

4.1. Canadians' love affair with equities is set to continue 27

4.1.1. Equities dominate the HNW portfolio and are forecast to grow their share further 27

...Continued

ACCESS REPORT @ <https://www.wiseguyreports.com/reports/1705951-wealth-in-canada-hnw-investors-2017>

Get in touch:

LinkedIn: www.linkedin.com/company/4828928

Twitter: <https://twitter.com/WiseGuyReports>

Facebook: <https://www.facebook.com/Wiseguyreports-1009007869213183/?fref=ts>

Norah Trent

wiseguyreports

+1 646 845 9349 / +44 208 133 9349

email us here

This press release can be viewed online at: <http://www.einpresswire.com>

Disclaimer: If you have any questions regarding information in this press release please contact the company listed in the press release. Please do not contact EIN Presswire. We will be unable to assist you with your inquiry. EIN Presswire disclaims any content contained in these releases.
© 1995-2017 IPD Group, Inc. All Right Reserved.