



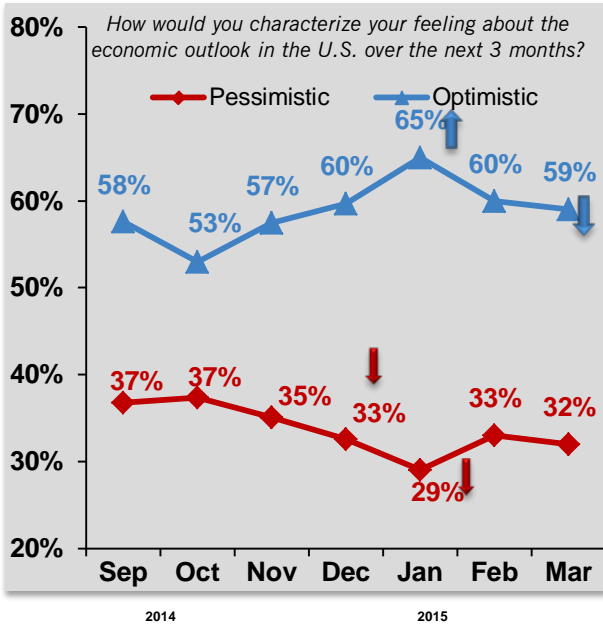
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Economic sentiment remains strong in March

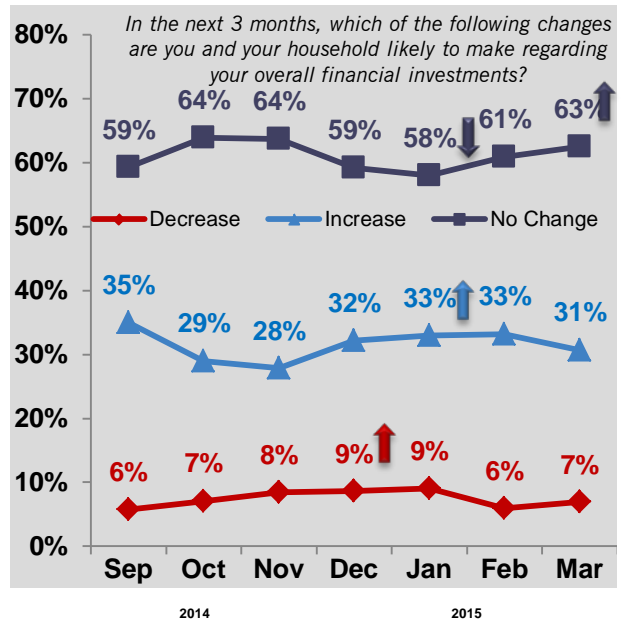
Three-out-of-five affluent households maintained an optimistic sentiment regarding the U.S. economy. HNW households were overwhelmingly positive with two-thirds feeling confident about the state of the economy. In Q1, there was a slight upward shift in affluent households that plan to keep their financial investments status quo (63% in March). Despite the continued strong sentiment expressed by HNW households, there's a downward shift in expected net increases to overall investments among this segment, from 45% in January to 31% in March.

AFFLUENT INVESTORS - \$100K+ INVESTABLE ASSETS

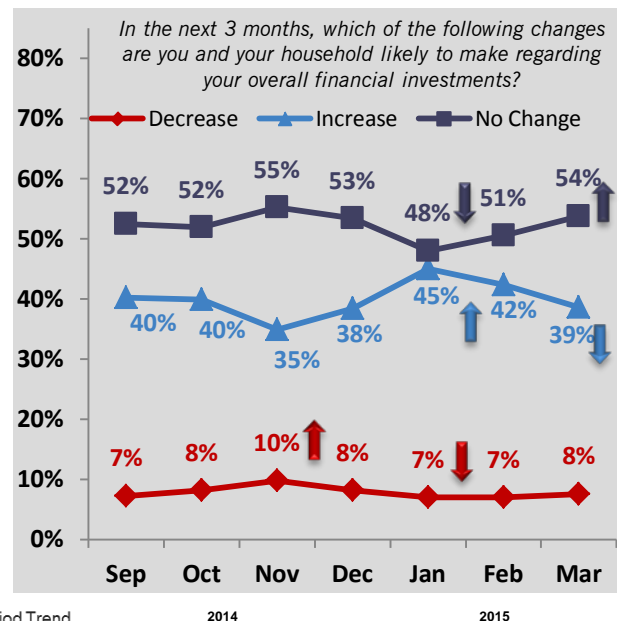
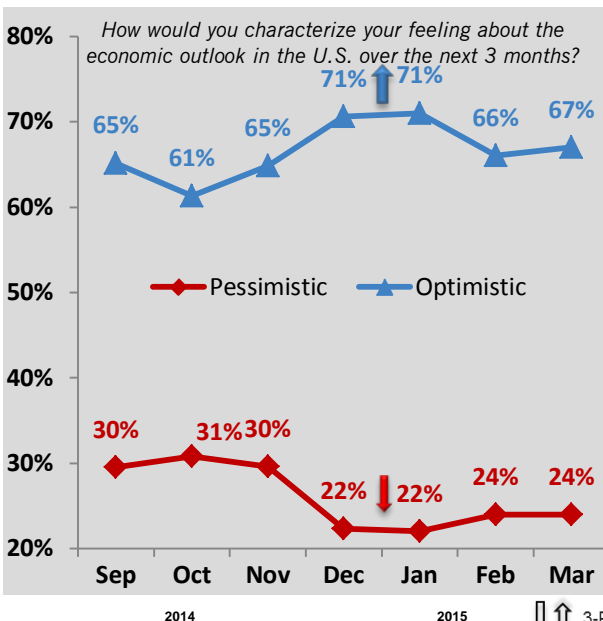
ECONOMIC SENTIMENT



INVESTMENT SENTIMENT



HNW INVESTORS - \$1MM+ INVESTABLE ASSETS



Note: remainder were "Not Sure" in each period. 3-Period Trend

Note: remainder stated they "do not own any investments"

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Source: Phoenix GWM-U.S. Tracking Program

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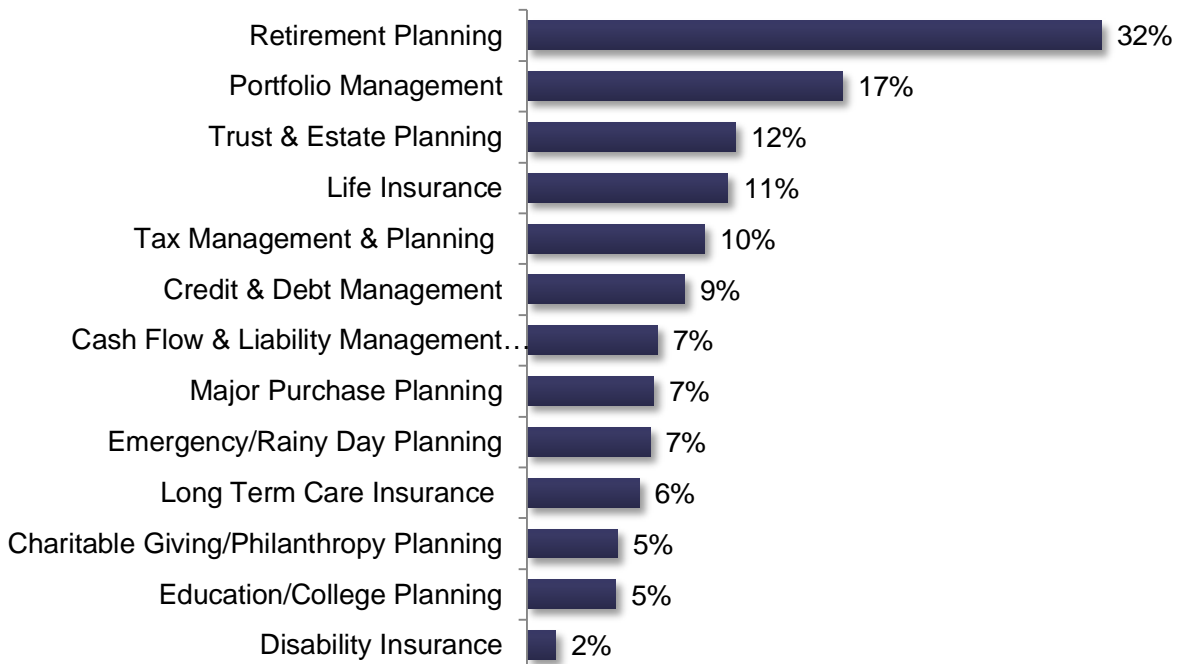
Millennials are most likely to engage in the use of online financial advice tools

Approximately one-quarter (24%) of total affluent households use online financial advice tools. Also referred to as Robo-Advisors, advice is programmatically delivered (via websites or smartphone apps) with no human advisor involvement. One-third of households headed by members under 35 years old report use of Robo-Advisors. Usage declines to just over one-fifth among the 55+ market. If available, the most likely services to use via this channel are Retirement Planning (32%), followed by Portfolio Management (17%).

Use of online financial advice tools by age \$100K+ Investable Assets

Age	%
< 35	36%
35-44	23%
45-54	31%
55-64	21%
65+	22%

Which of the following service are you likely to use with an online financial tool? - \$100K+ Investable Assets



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