



## **The Advisers' View of the HNW & Ultra HNW Markets – Spring 2007**

- This report examines HNWs and Ultra HNWs through the eyes of their investment advisers including IFAs, Private Banks, and Private Asset Managers.
- It is based on advisers actively involved with clients with a minimum of £350k in liquid assets. It examines the services they provide, the investments they recommend (and those they don't!), and their views on the future role of investment advice.
- It investigates their opinions of HNWs and Ultra HNWs as investors, the levels of investment skill advisers find in their clients and their views on the move to DIY investing by their clients, It will also examine how they plan to develop their businesses in 2007 and beyond.....

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