

Wealth management: How top executives think

To get a sense of business leaders' views on financial planning and money management, the BT-Citibank Wealth Survey polled top executives on their thoughts in this second annual study. Here is a summary of their responses.

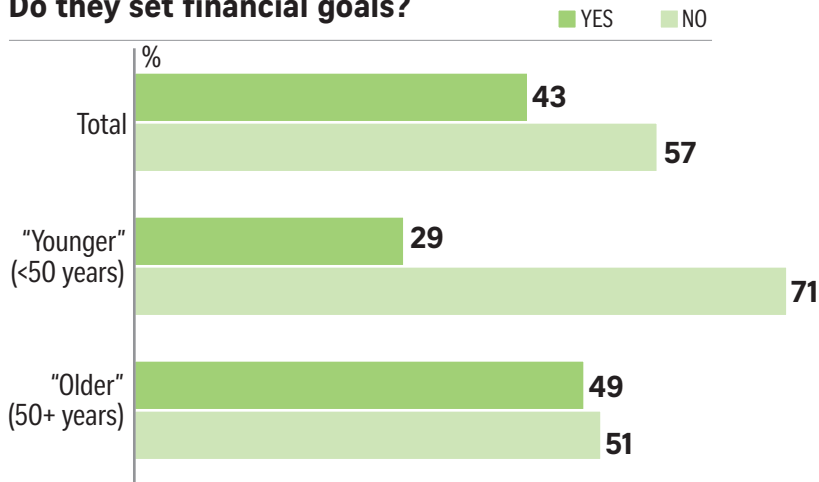


FINANCIAL PLANNING



Only three in 10 among those below 50 years old set financial goals for themselves, compared with one in two for those 50 and above. About half also believe that they should review their portfolios once every six months.

Do they set financial goals?

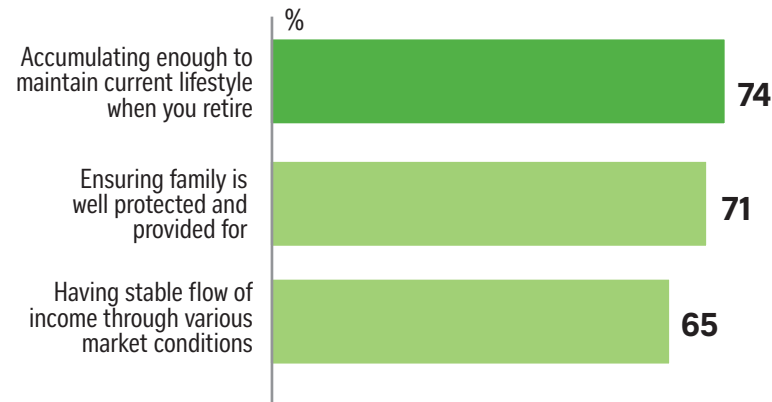


RETIREMENT PLANNING



Accumulating enough to maintain current lifestyles and ensuring one's family is well taken care of upon retirement rank highest in importance for those building up their nest eggs.

Wealth means...

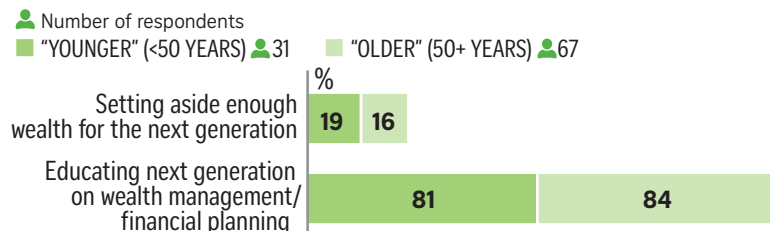


SUCCESSION PLANNING

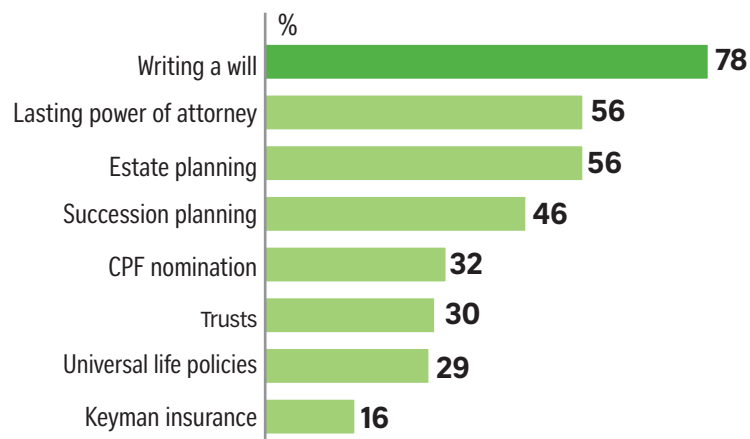


A significantly larger percentage of respondents believe in educating the next generation on wealth management, rather than setting aside enough wealth for them.

Legacy and succession planning



Require more information on...



Top 4 topics where investors need more information

