

THEDUBS

FINANCIAL CONTENT MARKETING

The nine HNW personalities





LinkedIn - HNW - Online Personas

-<https://www.linkedin.com/pulse/do-you-know-your-high-net-worth-personality-david-bleznak/>

The Nine HNW Personalities

① The Family Stewart

Family Stewards' chief financial concern is taking good care of their loved ones. Their goals usually center on issues like paying for children's tuition or passing on wealth to heirs. Family Stewards are often conservative financially, and want financial advisors who make them feel that their goal of caring for family is protected.



LinkedIn - HNW - Online Personas

-<https://www.linkedin.com/pulse/do-you-know-your-high-net-worth-personality-david-bleznak/>

The Nine HNW Personalities

② The Independent.

This type of affluent investor wants the freedom that financial security ensures—freedom to do what they want, when they want to do it. To them, wealth is a means to a desired end. They want to work with financial advisors who can give advice that will allow them to attain—and maintain—financial freedom and flexibility.



LinkedIn - HNW - Online Personas

-<https://www.linkedin.com/pulse/do-you-know-your-high-net-worth-personality-david-bleznak/>

The Nine HNW Personalities

③ The Phobic.

Phobics don't like investing, don't understand it and don't want to learn. They prefer to delegate investment duties to a financial advisor they trust and who demonstrates reliability and dedication.



LinkedIn - HNW - Online Personas

-<https://www.linkedin.com/pulse/do-you-know-your-high-net-worth-personality-david-bleznak/>

The Nine HNW Personalities

④ The Anonymous.

These are extremely private investors who value confidentiality and don't want to disclose their financial information to anyone. They tend to work with only one or two advisors whom they trust deeply because of those advisors' focus on privacy.



LinkedIn - HNW - Online Personas

-<https://www.linkedin.com/pulse/do-you-know-your-high-net-worth-personality-david-bleznak/>

The Nine HNW Personalities

⑤ The Mogul.

Moguls seek power, influence and control, and they tend to view investing as yet another arena where they can create those things.



LinkedIn - HNW - Online Personas

-<https://www.linkedin.com/pulse/do-you-know-your-high-net-worth-personality-david-bleznak/>

The Nine HNW Personalities

⑥ The VIP.

VIPs value prestige, and usually want their investments to help them buy possessions and social respect. VIPs prefer to work with “marquee” firms that are prestigious and well-known among their peers.



LinkedIn - HNW - Online Personas

-<https://www.linkedin.com/pulse/do-you-know-your-high-net-worth-personality-david-bleznak/>

The Nine HNW Personalities

⑦ The Accumulator.

These individuals save more than they spend, live below their means and don't show outward signs of affluence. They may have millions of dollars, but might wear only sale-priced clothes from discount stores. Their goal is capital appreciation, pure and simple. The more money they have, the better and more comfortable they feel.



LinkedIn - HNW - Online Personas

-<https://www.linkedin.com/pulse/do-you-know-your-high-net-worth-personality-david-bleznak/>

The Nine HNW Personalities

⑧ The Gambler.

To Gamblers, investing is all about excitement and drama—and, of course, performance results. They are most likely to believe that they can consistently beat the market, and want to work with financial advisors who will aggressively try to do so.



LinkedIn - HNW - Online Personas

-<https://www.linkedin.com/pulse/do-you-know-your-high-net-worth-personality-david-bleznak/>

The Nine HNW Personalities



The Innovator.

Innovators like new investment products, strategies, services and trading methods. They want advisors who are technically savvy and up to speed in their knowledge of and approach to investing—and who will offer them the newest and often most complex solutions.



Contact Us



MAKE CONTACT

Alexandra Middleton

// Senior Content Producer

✉ alexandra.middleton@thedubs.com

☎ 02 8247 8700