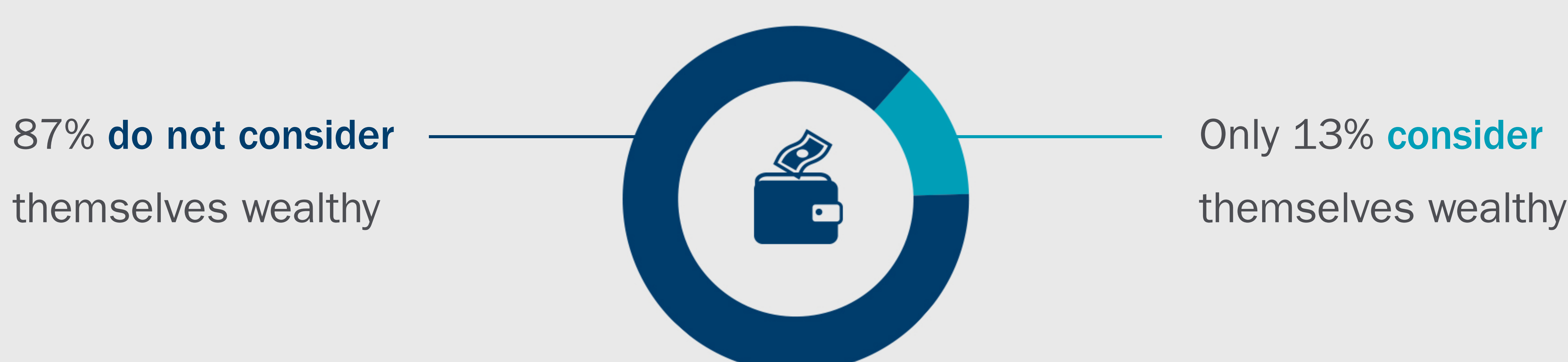


# Modern Money | part II

Newly-released data from Ameriprise Financial reveals how today's investors navigate their financial lives. The latest data is part of the Ameriprise *Modern Money* study, which surveyed more than 3,000 U.S. adults ages 30-69 with at least \$100,000 in investable assets, including more than 700 millionaires.

## Building wealth is a journey, even for millionaires

How respondents with \$1 million or more in investable assets perceive their wealth



## Planning is key

The majority of investors surveyed have an informal or formal financial plan.



53% have specific target amount or rough idea of how much they need to save and invest



43% have a detailed financial plan



4% do not have any type of financial plan


## Retirement is top-of-mind for all

Millennials, Generation X, and Boomers who participated in the survey all have the same **top financial priority**.



**#1** saving for retirement

## Shifting money attitudes

**49%** 

of respondents believe their approach to making long-term investing decisions is different or very different from what they saw their parents do growing up, compared with **42%** who say it's similar or very similar

**51%** 

of survey respondents say that aligning investments with personal values is more important today compared with **10 years ago**. This attitude is consistent among Millennials, Generation X, and Baby Boomers

When it comes to handling long-term investment decisions:

**38%** 

say they partner with someone else

**46%** 

say they make those decisions alone

The *Modern Money* study was created by Ameriprise Financial, Inc. and conducted online by Artemis Strategy Group December 11-25, 2018 among 3,008 U.S. adults between the ages of 30-69 with at least \$100,000 in investable assets. Millennials are defined as ages 30-37, Gen X is ages 38-53 and Boomers ages 54-69. For further information and details about the study, including verification of data that may not be published as part of this report, please contact Ameriprise Financial or go to [Ameriprise.com/modernmoney](http://Ameriprise.com/modernmoney).

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