

# 2025 Generational Wealth Transfer

There is a large and growing opportunity to help the aging population transfer their wealth to the next generation. Estimates run as high as \$84T being transferred between generations by 2045.<sup>1</sup> Capitalizing on this opportunity will take careful planning, positioning, and developing value-added services and support for older parents and their adult children, and the advisors serving them. Greenwald has designed a study to gather meaningful insights from both those who plan to bequest their wealth to their children and advisors who work with such individuals.

<sup>1</sup> Cerulli Associates, January 2022, [Press Release: Cerulli Anticipates \\$84 Trillion in Wealth...](#) | Cerulli

## Survey of 1,000 Benefactors/Parents

Age 70+, have \$500K+ in household investable assets, plan to bequest most/all to children

- How they are planning for wealth transfer
- Key concerns in planning for wealth transfer
- If they work with a financial professional, and if the financial professional is overly focused on one spouse
- Relationship with children
- Communication of their plans with children
- Willingness to introduce advisor to children

## Survey of 500 Financial Professionals

Manage \$50M+ in AUM, in the business for 5+ years, at least 30% of clients age 70+

- Strategies for wealth transfer
- Products used in wealth transfer
- How much focus is on asset retention
- Success rates in retaining assets
- Value in establishing relationships with children, and how they do so
- Working with married/partnered couples
- What pitfalls exist/where can they improve or learn more



### Timeline:



**Cost:** \$18,000

**Early Bird Pricing (Sponsor by 1/31/2025):** \$17,100

**Sponsor the Generational Wealth Transfer Study!**

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