



MARKET EXPERTISE

You Demand We Deliver

HNWIs CATI - Quantitative

Number of Interviews - 125

Objective

The study was to research into the strategy and financing needs of High Net Worth Individuals.

Methodology / Approach

We interviewed 125 high net worth individuals on their investment strategies and potential future engagement with Family Businesses. The criteria to screen the High net Worth Individuals was they should have a minimum of \$10M in liquid assets or assets potentially for sale

The target was to aim for a large proportion of High Net Worth Individuals who answer 'Inherited stake in family business' or 'Built own business' as they are likely to have had experience with family businesses.

Sourcing the High Net Worth Individuals:
The client gave us an initial list of High Net Worth Individuals. We sourced our own list with the help of Bloomberg, Hoovers, LinkedIn and Social Media sites.

Deliverable

The results of the this project was uploaded onto the links provided by the client which was down loadable in MS – Excel format.

The respondent status sheet was delivered to the client at then end of the project.