In this issue of Investments & Wealth Monitor, we focus on demographics—the explore contemporary women and their wealth, “Women of Wealth: Unheard for Far Too Long,” by Amy Hart Clyne; and “The Secrets to Earning a Female Investor’s Trust— and Her Business,” by Kim Sharan. Frequent contributor Anna Rappaport also shares compelling demographic information in “Financial Preferences and Priorities by Demographic Group.”


Advisors today need to engage younger investors and expand their brands, which April Rudin addresses in “Social Media: Making the Professional More Personal.” Nilesh Vaidya and Elias Ghanem advise about attracting the next generation in “Adjusting to a Changing Economy: Wealth Management Firms Expand Technology Frontiers to Capture New—Generation Investors.” Cole Smead discusses the investment implications of the demographic shift in “Millennial Boom: Demographics Point Toward Economic Growth,” and Philip Toews addresses “Inflation’s Corrosive Effect on Financial Asset Returns: Building Portfolios with Rising Rate and Inflation Contingencies.”

And don’t miss the Institute’s latest research about trends in the delivery of wealth management services in “Defining Wealth Management: Knowledge and Service Capabilities Required for Today’s Financial Advisory Practitioners and Wealth Management Teams.”

Learn more about IWI’s scholarship program, known as the THRIVE Initiative, at www.investmentsandwealth.org/certifications/scholarship—fund. And please join us at ACE Academy in Nashville, May 15–18. Hear from Ivy League professors and thought leaders, and network with peers.

Anthony B. Davidow, CIMA® Chair, Investments & Wealth Monitor Editorial Advisory Board

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