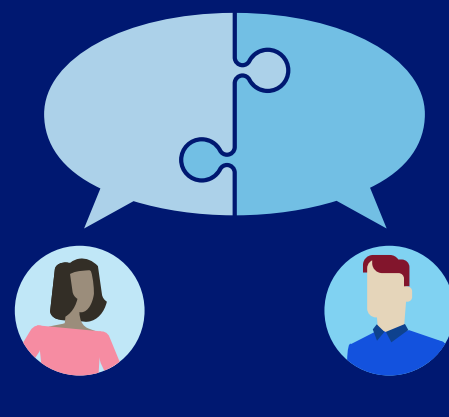


Not Just Finance:

What Clients Wish Advisors Would Talk About



Clients are looking for deeper and more wide-ranging conversations with their advisors. These **10 facts** from “The Future of Client-Advisor Relationships,” a study from AIG Life & Retirement and the MIT AgeLab, offer insights to help advisors build strong relationships with clients.

1

Safety from scammers

Fraud prevention and identity protection are top-of-mind concerns for clients 60-75, yet most aren't talking about it.



2

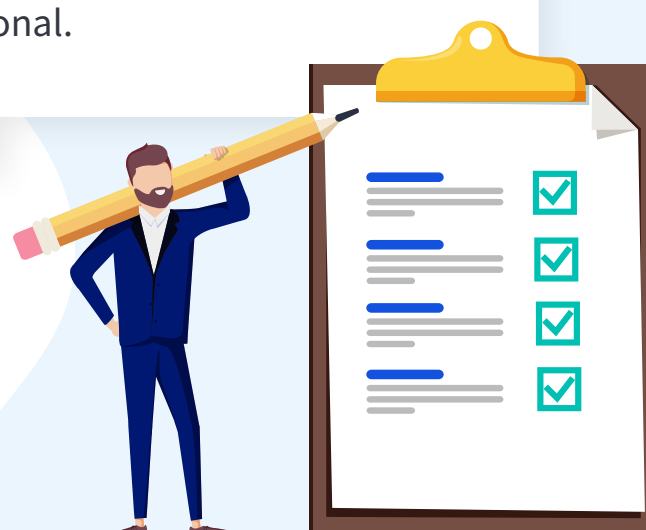
Physical health

is a top of mind concern for clients across all ages, yet nearly **60%** have not discussed it with their financial professional.

3

Client satisfaction

The most satisfied clients discuss the widest range of topics, from finances to family matters, with their financial professional.



4

Making moves

44% of clients would like to consult with their financial advisor about housing.

5

Personality counts

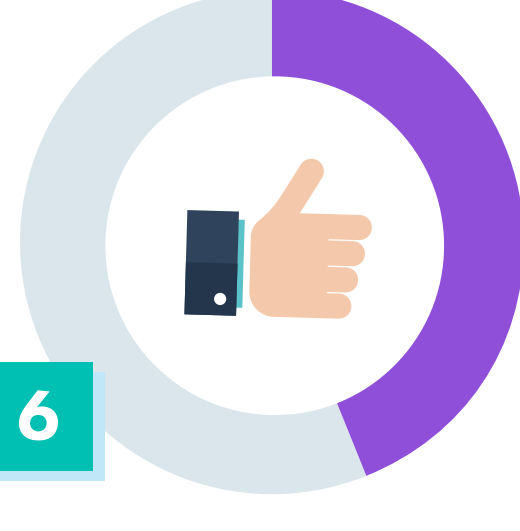
48% of younger clients say their financial advisor's personality is the most important factor.



6

Friends and family drive referrals

Nearly half of all financial clients (**44%**) find their advisor through the recommendation of a family member or friend.



7

“Helping me see my plan for my future”

Clients say this is a top quality in an ideal financial professional.

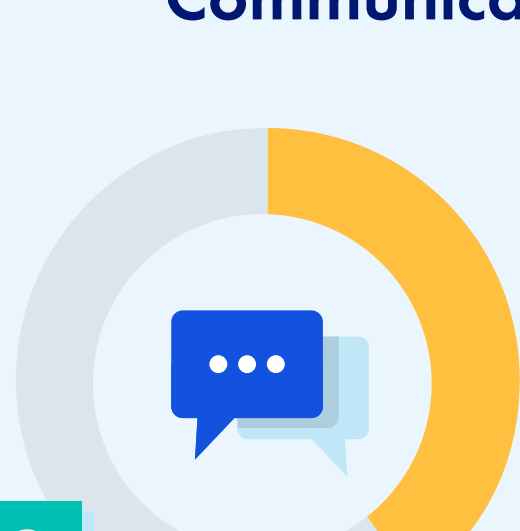


Younger Clients Value Communication & Connection

8

Stay in touch

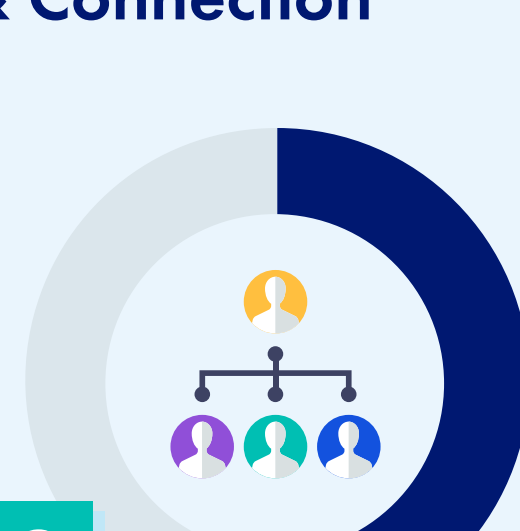
40% of younger clients (ages 30-45) communicate with their financial advisor more than once a month, far more frequently than their older counterparts.



9

The company you keep

63% of people 30-45 years old say their advisor's network is a key driver of satisfaction with the advisor.



10

Let's be friends

Nearly a third of younger clients see their financial advisor as a life coach and a friend.



Discover how this valuable new research from MIT AgeLab and AIG Life & Retirement can help you build deeper connections with clients.

We see the future in you.™ — **AIG**

[CLICK TO LEARN MORE](#)

The MIT AgeLab conducted a national survey of 2,038 participants between March 6 and March 26, 2020. The survey asked participants when, where and how they interacted with financial professionals and what topics they felt most comfortable and interested in discussing. Participants ranged in age from 30 to 75 and reported a yearly household income of \$50,000 or more and total savings of \$50,000 or more, including savings accounts, checking accounts and investment or retirement accounts. All participants reported regularly working with a financial professional.

AIG Life & Retirement consists of four operating segments: Individual Retirement, Group Retirement, Life Insurance and Institutional Markets. It includes the following major U.S. life insurance companies: American General Life Insurance Company; The Variable Annuity Life Insurance Company; and The United States Life Insurance Company in the New York. American International Group, Inc. (AIG) is a leading global insurance organization. AIG member companies provide a wide range of property casualty insurance, life insurance, retirement solutions, and other financial services to customers in more than 80 countries and jurisdictions. These diverse offerings include products and services that help businesses and individuals protect their assets, manage risks and provide for retirement security.

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