When it comes to women and wealth, the biggest risk for advisers is refusing to change, remaining in our comfort zones, and operating as we have always operated. In turn, the biggest risk for female clients is settling for poorly delivered, lazy, and outdated advice.

Women and wealth: Three findings and their risks

Research relates to women’s preferred communication style for money and investing, the types of investments that appeal to most women, and their attitudes towards risk-taking.

Women tend to talk about money matters in more grounded language about money and investing?

1. How women prefer to communicate about money and investing?

How do you talk to yourself?

Most women don’t like to talk about money matters in grounded language about money and investing?

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Whether it’s investing in social causes or the stock market, as long as a woman is interested and an opportunity is aligned with her personal causes and concerns, she will be motivated to take a risk. She might take more time to make an investment decision, but that’s because she does her homework. Once she has delved into the details to her satisfaction, she will take calculated risks and move forward.

What is risky about getting risk wrong?

When we talk about risk tolerance, we often assume the risk we are tolerating is in short-term market volatility. But the real risk is when longer-term investment objectives are not met.

For advisers:

1. Clients don’t take enough risk or if they take too much risk, we lose an unhappy client. Make risk a much broader conversation.

For female clients:

1. It is risky when advisers blindly follow the stereotypes of what women are or aren’t comfortable with. Advisers need to create deep value propositions that resonate with consumers of all types of wealth and income levels.

They need to look beyond the classical financial planning to take a more holistic approach.

Both women and men need to tailor their investment strategy on a case-by-case basis, taking into account the woman’s unique life circumstances.

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What is risky about investing in causes and conscious that matters?

For advisers:

1. It is risky when advisers follow the stereotypes about women’s long-term investor objectives will not be met. Advisers need to communicate in their language and understand their needs. Studies show, the more complex the investment, the more likely to be rejected.

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