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## **New FOX Study: Millennial Family Clients Want to Keep Their Family's Advisors**

*FOX's "Engaging the Client of the Future" Identifies Expectations of Millennial Wealth Owners*

**Chicago, February 18, 2015** – New research from Family Office Exchange (FOX), a global membership organization of private family enterprises and their key advisors, shows that Millennial wealth owners value and aim to retain their family's advisors—if the advisors can adapt to meet Millennials' expectations.

The FOX Family Client of the Future research, highlighted in FOX's new white paper "Engaging the Client of the Future," finds that Millennial family clients are eager to work with experienced advisors who already know their family, and who can help them address their needs—just so long as the advisors are ready, willing and able to adjust to their Millennial clients' expectations on engagement and value delivery. The white paper identifies five themes that shed light on those expectations and provides eight recommendations for engaging Millennial family clients. The study also includes a Millennial Engagement Strategy Assessment Tool to help advisors evaluate their strengths.

"While Millennials' needs are similar to those of their parents and grandparents, their expectations for how wealth advisors should meet those needs are notably different than those of earlier generations," says Amy Hart Clyne, executive director of the knowledge center at FOX. "This report helps advisors gain insight into the Millennial point of view, understand the expectations of Millennial family clients, and identify ways to enhance their relationship with Millennials."

FOX's "Engaging the Client of the Future" white paper is a benefit of FOX membership and is available to all FOX members [on the Family Office Exchange website](#).

### **About Family Office Exchange**

Family Office Exchange (FOX) is the premier global member network for enterprise families and their advisors who are pursuing best practices for managing their family enterprise and sustaining their family wealth. The community includes over 8,000 sophisticated family leaders and advisors from 460 organizations in 20 countries who utilize FOX's resources each year for advice, networking, education, and comparative metrics.

FOX is headquartered in Chicago with offices in New York, San Diego and London. For more information about FOX, call 1.312.327.1200 (The Americas) or 44.(0)20.7520.9443 (Europe,

Africa, Asia/Pacific) or visit [www.familyoffice.com](http://www.familyoffice.com).