

Who's Switching Investment Firms & Why?

Discover & leverage AI-powered data on intent & churn signals to find out

6.8 Million

Likely to switch or open investment accounts in the next 12 months

42%

Believe the value of the stock market will increase in the next 12 months

20%

Have total investable assets worth \$250,000 – \$2 million

16%

Make at least 10 trades a month

At-risk firms.

These investment firms may lose customers looking to switch firms in the next year. Resonate buyer intent & churn signals can tell you why

Vanguard

Fidelity INVESTMENTS

charles SCHWAB

BlackRock

EXTRADE
from Morgan Stanley

Who are the 6.8 million investment-account switchers?

Demographics are foundational — but they only tell a part of the story.

18%
have a post-grad degree

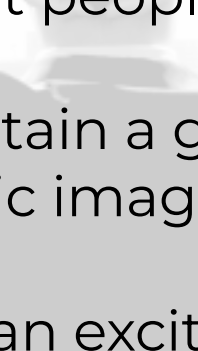
26%
are ages 18-24

68%
are men

55%
have children

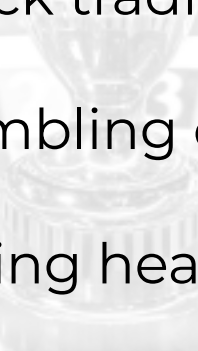
53%
are married

Fill in the gaps and take data-driven action with fresh, rich insights that drive results.



Top personal values:

- Be in charge and direct people
- Maintain a good public image
- Live an exciting life



Favorite hobbies:

- Stock trading
- Gambling online
- Eating healthy



Daily routine:

- Participate in teams and classes
- Achieve athletic milestones
- Buy nutritional food

Top 5 considerations when choosing a firm:

#1 Convenience

#2 Firm's past performance

#3 Tailored services based on individual needs and preferences

#4 Online investment tools

#5 Personal 'chemistry' with an advisor

Where you can find investment-account switchers:



Top TV shows:

- Rick and Morty
- Law & Order: SVU
- American Horror Story



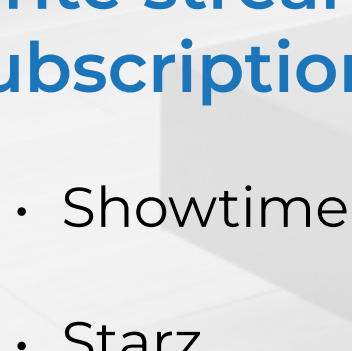
Top TV networks

- NBA TV
- MLB Network
- BBC



How they watch TV

- Mobile Phone
- Tablet
- Smart TV



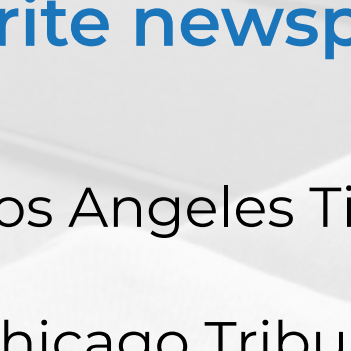
Favorite streaming subscriptions

- Showtime
- Starz
- AMC+



Social media

- LinkedIn
- Discord
- Twitch



Favorite newspapers

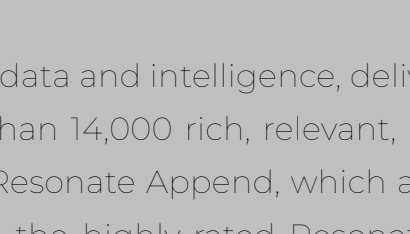
- Los Angeles Times
- Chicago Tribune
- New York Post

Understand & act with a comprehensive understanding of consumers

The insights shared in this infographic were uncovered using Resonate Investments, an AI-powered data set that provides investments marketers with better insight to fuel data-driven marketing across the customer lifecycle.

Want to learn more?

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ABOUT RESONATE

Headquartered in Reston, VA, Resonate is a pioneer in AI-driven data and intelligence, delivering proprietary, privacy-safe consumer data for insights, analysis and activation. The Resonate data set includes more than 14,000 rich, relevant, real-time data points that holistically describe more than 230 million US individuals. Resonate data is delivered through Resonate Append, which allows customers to leverage Resonate data anywhere and anytime; the easy-to-use Resonate Ignite platform; or through the highly-rated Resonate-Managed Media Services. Hundreds of companies use Resonate to drive more effective marketing strategy and execution fueled by a more comprehensive understanding of their audience that extends beyond traditional demographics, psychographics and behavioral data to uncover why people choose, buy, or support certain brands, products or causes. For more information, please visit www.resonate.com.

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