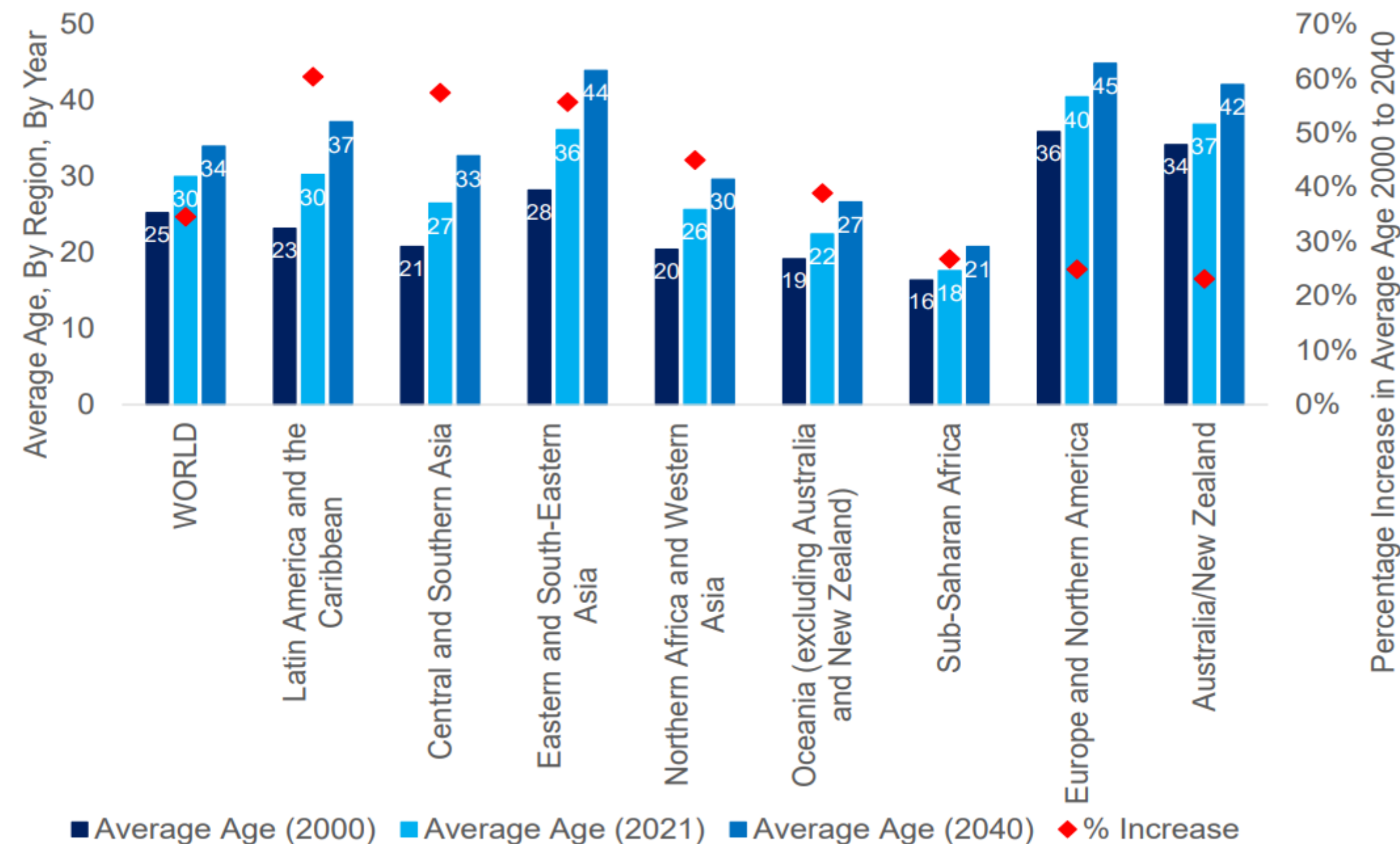


Secular Growth Stories: The Global Transfer of Wealth

The Story of the Week in Charts

The World Is Aging, Albeit at Different Rates...

Median Age 2000, 2021, and 2040, by Region



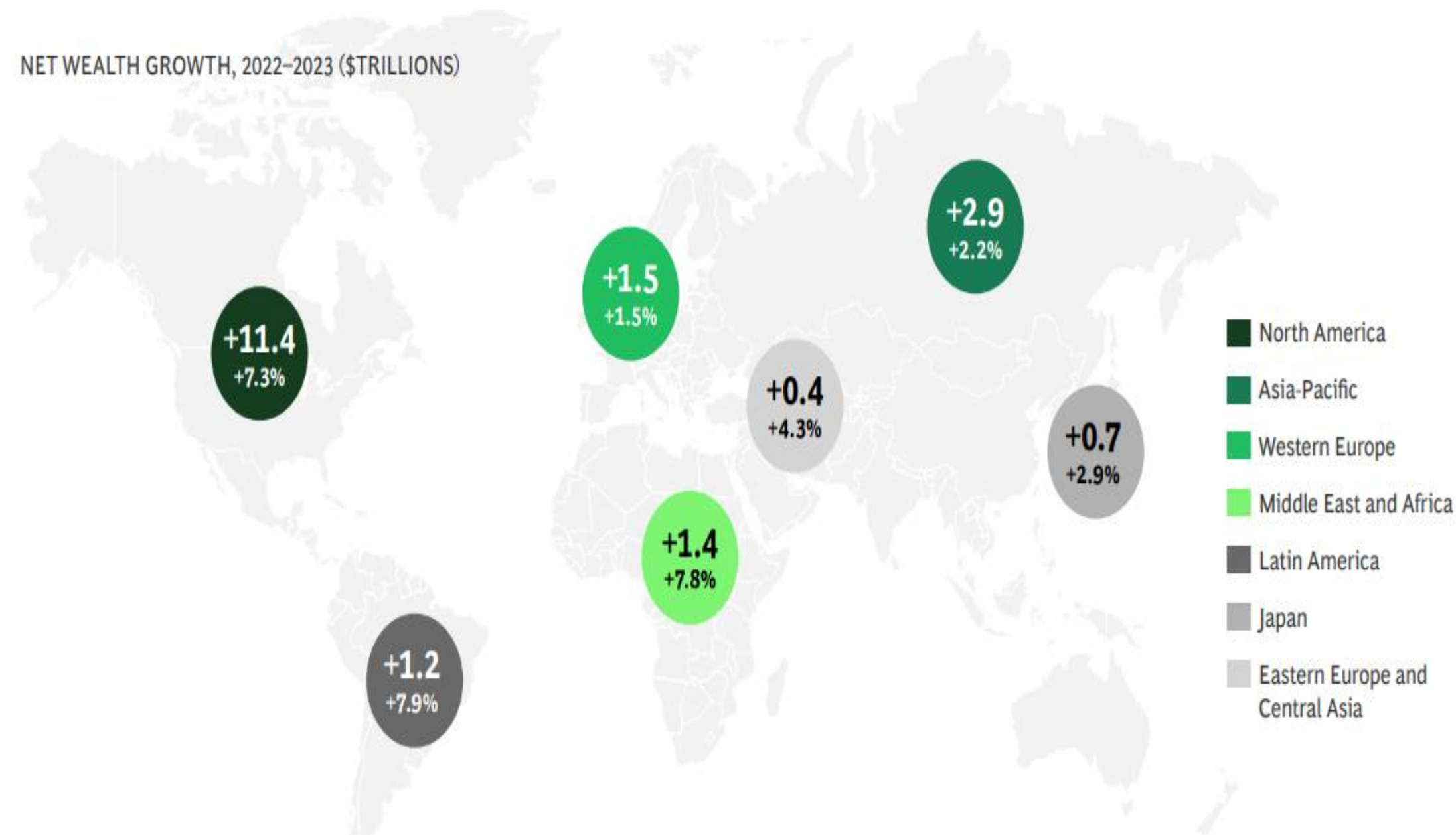
The global population is becoming, in aggregate, older than it ever has been. [...] between 2000 and 2040, a 35% increase in the average age of the population is projected, from 25 in 2000 to 34 before mid-century.”

Read Citi GPS’s full paper:

[Embracing Demographic Transition: Health and Wealth in an Aging World \(Citi GPS\), Jul 2024](#)

...Putting Trillions of U.S. Dollars in Flux, Both Across Generations and Geographies...

Three Regions Account for More Than 80% of Global Net Wealth



“

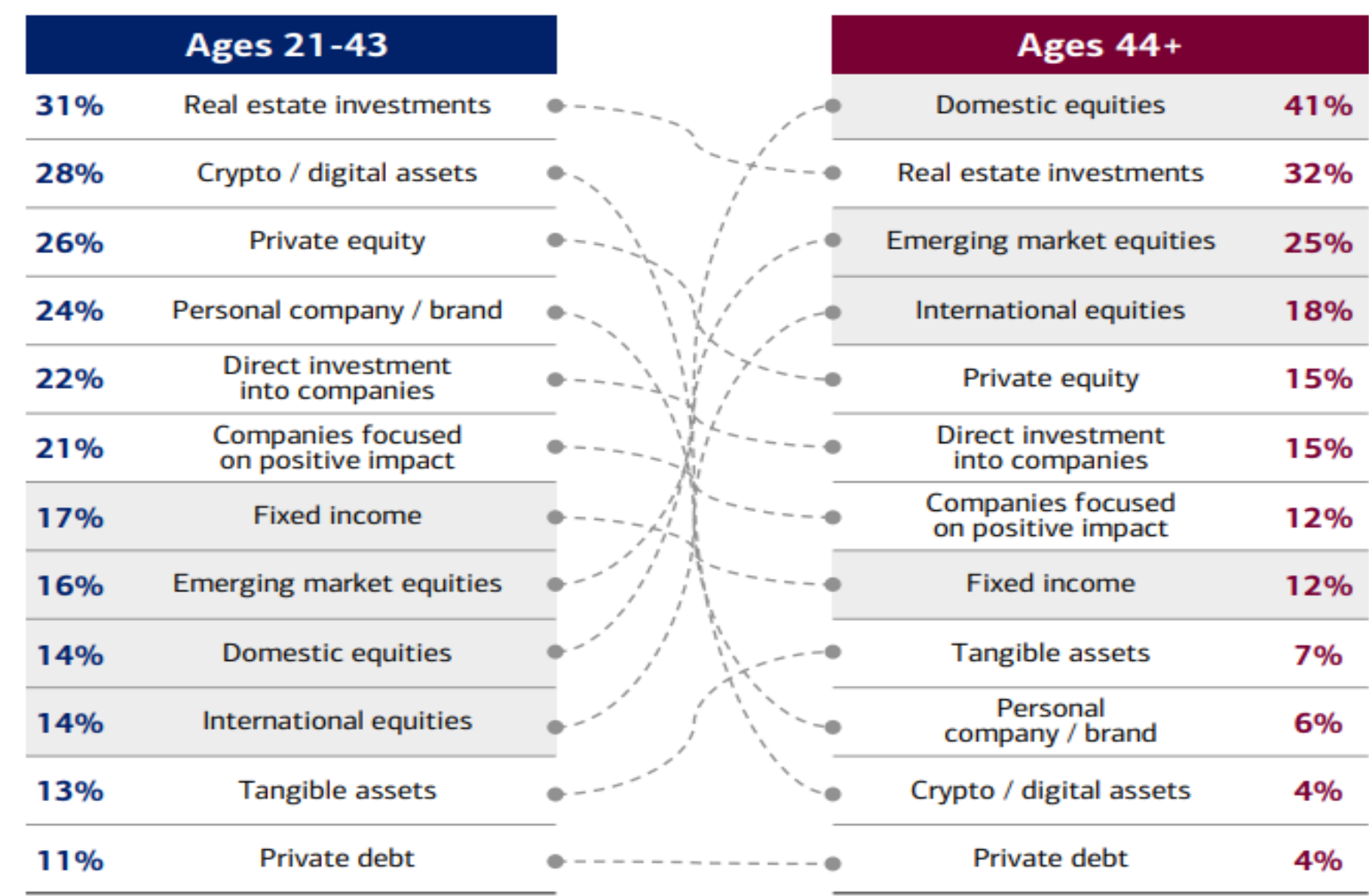
Global net wealth, which comprises financial wealth, liabilities, and real assets, grew by 4.3% in 2023, to \$477 trillion. [...] This represents a promising recovery from 2022, when total wealth rose only 0.2%, although it is still modest compared to the average annual growth rate of 7.1% achieved from 2014 to 2021.”

Read BCG's full paper:

[Global Wealth Report 2024: The GenAI Era Unfolds \(BCG\), Jul 2024](#)

...With a Shift in Focus Across Asset Classes.

Six Options Outrank Traditional Investments, for Younger Investors



“

[...] , younger wealthy people seem to favor just about any kind of investment besides traditional options when it comes to growth opportunities. Older wealthy people, in contrast, still put the traditional choices at the top of the list. The one category where all investors seem to agree on investment potential is real estate.

Read Bank of America’s full paper:
[2024 Study of Wealthy Americans \(Bank of America Private Bank\), Jun 2024](#)

Source: Bank of America
Note: The figure shows greatest opportunities for growth

Further Reading

Global Wealth

[Following Next-Gen Money \(Charles Skorina\)](#)

We've all heard by now that the next several decades will see the "greatest transfer of wealth in history with \$84 trillion expected to pass down to younger generations. Why does it matter to investors?

[RIA to MFO: Taxonomy of the Multi-Family Office World \(Investments & Wealth Institute\)](#)

Multi-family offices may be distinguished from the broader independent advisor universe in that they seek to provide highly integrated wealth management services focusing on ultra-affluent families.

[U.S. Generational Wealth Distribution: A New Paradigm? \(Wellington Management\)](#)

Fixed Income Portfolio Manager Brij Khurana discusses the implications of U.S. Baby Boomers' wealth concentration in the event of a market decline.

[Private Wealth Migration Report 2024 \(Henley & Partners\)](#)

This is an annual publication for followers of wealth and investment migration trends, and it features exclusive millionaire migration data.

[Crossing the Threshold: Mapping a Journey towards Alternative Investments in Wealth Management \(CAIA\)](#)

Along this journey, you will meet several industry professionals who will not only shed light on the benefits and risks of alternative investments in client portfolios, but also outline crucial steps in implementing these investments effectively.

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