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Millionaire Rankings by State

Through Year-End 2019



2019 Summary of Findings

Background & Methodology

Sizing/Ranking/Methodology

- The Phoenix Wealth and Affluent Monitor (W&AM) U.S. Study is able to provide estimates of the number of affluent and HNW households in the country. Sizing estimates are available at the State level as well as by Core-Based Statistical Areas (CBSAs) – this report focuses on state-level data.
- The W&AM sizing estimates are developed using a combination of sources including the Survey of Consumer Finance (SCF), as well as Nielsen-Claritas. The SCF provides the framework and allows us to determine the general distribution of households by their level of investable assets. Estimates are further refined using the age and income distributions provided by Claritas. Together, these inputs enable us to estimate the number of households by investable assets at a national level. Formulas are then created by applying national estimates to closely linked variables developed by the Census, which allows us to obtain estimates at smaller units of geography.
- Please note that the numbers provided in this report are approximations, not exact actual number of households. They are intended to be used for comparative purposes.
- *Rankings are based on the percentage of millionaire households out of total estimated households in the state, and go from 1 to 51 (District of Columbia is included).*

2019 Top & Bottom Ranked States

New Jersey 1

- 2nd year in a row ranked #1
- Has ranked in the top-four every year since 2006
- Ratio has gone up 2% in two years



Maryland 2

- Trails New Jersey by only .04%
- Moves up two spots from 2018, after ranking #1 from 2011 to 2017



Connecticut 3

- Fourteenth consecutive year ranked among the top-five states
- Three years in a row at #3



Massachusetts 4

- Increased one spot from 2018, and has slowly improved in recent years, after ranking 7th in 2014



Hawaii 5

- Hawaii rounds out the top-five after finishing 6th in 2018, and historically ranking in the top-five on average



Mississippi 51

- The lowest ratio of millionaires reside in Mississippi, for the seventh consecutive year



West Virginia 50

- Typically ranked near the bottom over the last ten years, 2019 marks West Virginia's third year in a row ranked 50th



Arkansas 49

- Arkansas yields the 3rd-lowest ratio of millionaires for the third straight year, and has placed bottom-three since 2007



Kentucky 48

- Kentucky remains in the bottom five states for the 14th consecutive year (since 2006)



Louisiana 47

- Louisiana has moved up and down in recent years, falling from 39th in 2018 to 47th this year, after having peaked at 32nd in 2013



Biggest Movers in 2019

Arizona | Idaho | Indiana | South Carolina

+4 Spots

- Four states each move up four spots in the 2019 rankings
- South Carolina improves to #37 overall, its first time back in the top-40 states since 2012
- Arizona breaks into the top-half of rankings at #25 overall, improving for the third time in the last four years
- Idaho and Indiana gain four rank spots in 2019, but continue to place around 40th overall in the country over the last several years

Georgia | Nevada

+3 Spots

- Georgia moves up to 24th-highest, continuing a steady upward trend since ranking merely 40th in 2014
- Nevada (32nd) reaches its highest rank since it was a top-20 state from 2010 to 2012



Biggest Movers in 2019

Wyoming

-11 Spots

- Wyoming suffers the worst decline this year, falling 11 spots to #35 overall
- This continues a notable downward trend for Wyoming, which ranked as high as 15th in 2017

Louisiana

-8 Spots

- Following a five-year trend with an average rank of 40th, Louisiana drops eight spots this year to 47th lowest

Washington D.C. | Kansas | South Dakota

-4 Spots

- Kansas and South Dakota fall four spots each but remain mid-tier in the country
- D.C. moves from 2nd to 6th, though is still the only “state” outside the top-five with over 9% millionaires



2019 Detailed State Ranking Table

2019						2019					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2018	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2018
1	New Jersey	3,312,916	323,443	9.76%		27	Florida	8,464,598	496,971	5.87%	-2
2	Maryland	2,274,491	221,189	9.72%	+2	28	Nebraska	770,566	45,130	5.86%	+2
3	Connecticut	1,380,296	130,291	9.44%		29	Wisconsin	2,370,721	138,283	5.83%	+2
4	Massachusetts	2,710,577	254,201	9.38%	+1	30	Kansas	1,142,371	66,406	5.81%	-4
5	Hawaii	482,601	44,383	9.20%	+1	31	Iowa	1,280,747	73,129	5.71%	+1
6	District of Columbia	323,410	29,506	9.12%	-4	32	Nevada	1,137,374	63,752	5.61%	+3
7	California	13,477,890	1,147,251	8.51%	+1	33	Maine	571,089	31,993	5.60%	+1
8	New Hampshire	539,929	45,758	8.47%	-1	34	Ohio	4,713,750	261,157	5.54%	-1
9	Virginia	3,272,722	272,103	8.31%	+1	35	Wyoming	235,738	12,849	5.45%	-11
10	Alaska	272,739	22,302	8.18%	-1	36	North Carolina	4,111,516	224,054	5.45%	+1
11	Washington	2,971,172	233,155	7.85%		37	South Carolina	2,016,355	108,812	5.40%	+4
12	New York	7,584,043	570,456	7.52%		38	Missouri	2,452,321	132,176	5.39%	
13	Colorado	2,275,868	170,223	7.48%		39	Indiana	2,596,546	138,739	5.34%	+4
14	Minnesota	2,250,486	167,206	7.43%		40	South Dakota	354,470	18,905	5.33%	-4
15	Illinois	4,865,837	346,873	7.13%		41	Montana	450,459	23,785	5.28%	+1
16	Utah	1,016,121	71,613	7.05%	+2	42	Tennessee	2,674,857	139,335	5.21%	-2
17	Delaware	371,672	25,937	6.98%	-1	43	Idaho	654,878	33,656	5.14%	+4
18	Rhode Island	420,830	28,165	6.69%	-1	44	New Mexico	813,135	40,450	4.97%	+1
19	Pennsylvania	5,109,218	328,859	6.44%	+1	45	Oklahoma	1,543,632	75,567	4.90%	-1
20	Oregon	1,692,389	108,858	6.43%	+2	46	Alabama	1,935,466	94,259	4.87%	
21	Texas	10,285,623	650,216	6.32%	-2	47	Louisiana	1,820,554	87,565	4.81%	-8
22	Vermont	260,740	16,411	6.29%	+1	48	Kentucky	1,781,341	83,624	4.69%	
23	North Dakota	324,512	20,002	6.16%	-2	49	Arkansas	1,189,790	51,532	4.33%	
24	Georgia	3,940,078	239,287	6.07%	+3	50	West Virginia	749,518	31,535	4.21%	
25	Arizona	2,670,859	161,014	6.03%	+4	51	Mississippi	1,131,470	47,279	4.18%	
26	Michigan	3,968,527	236,858	5.97%	+2		Total	125,018,808	8,386,508	6.71%	

Key Takeaways

Rankings generally remain consistent year over year

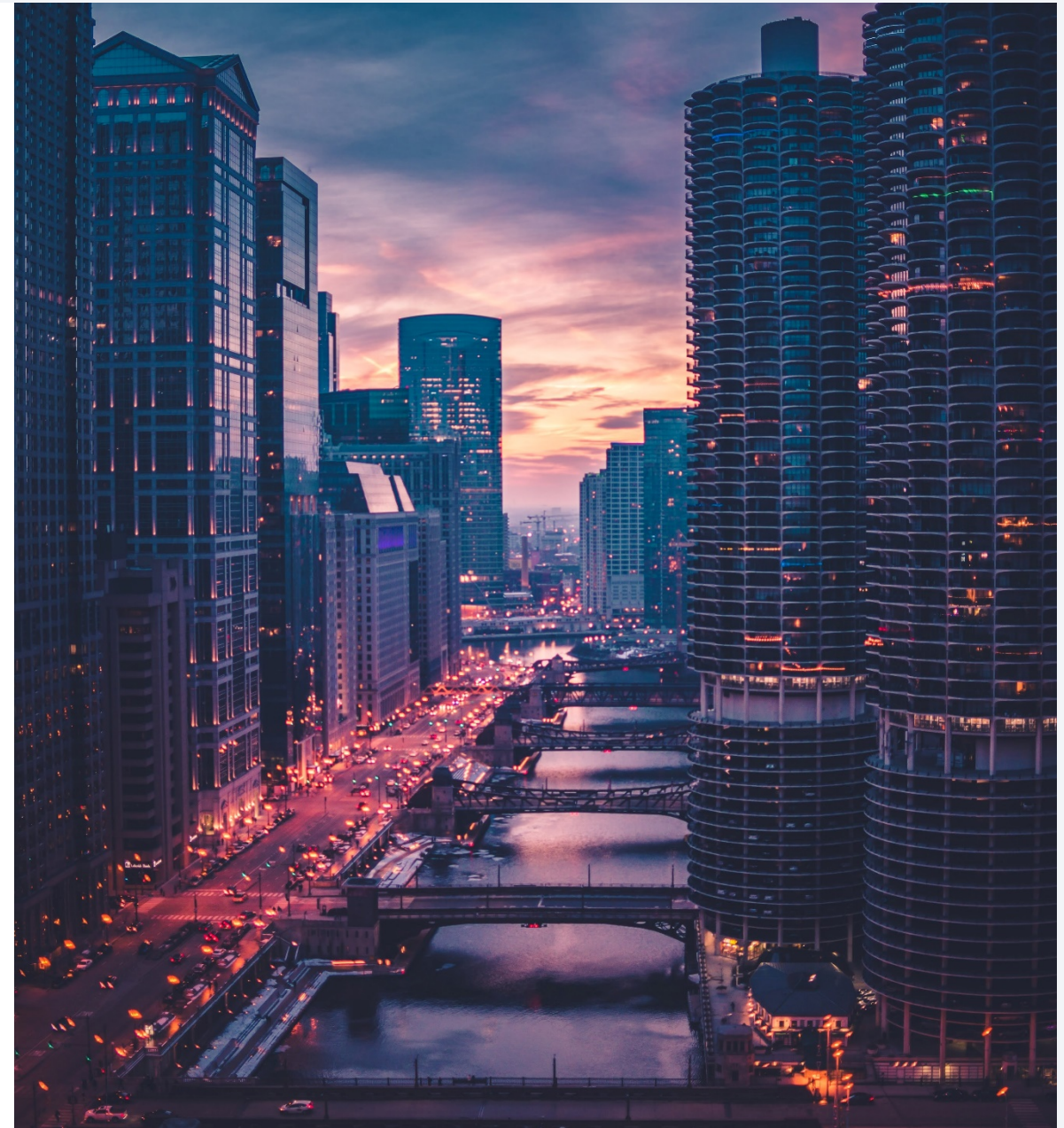
- The top-five and bottom-five states saw little movement in 2019, and over time have mostly stayed the same

Ratios of Millionaires are rising in the top states

- Up through 2017, the highest ranked state never had above an 8% ratio of Millionaires – then six states did so in 2018
- In 2019, 10 states rated above 8%, including the top-six each ending up with over 9% Millionaire households

Overall population does not always correlate with percentages of Millionaires

- Some of the most populous states place highly in the latest Millionaire rankings, such as New York and California
- However, other large states such as Texas and Florida rank only 21st and 27th, respectively – while top-10 performers include relatively sparsely-populated states such as Hawaii, Alaska and New Hampshire





Appendix: Historical State Ranking Charts

Millionaire Households Per Capita - 2018

2018						2018					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2017	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2017
1	New Jersey	3,283,467	293,992	8.95%	+1	27	Georgia	3,891,635	211,662	5.44%	+5
2	District of Columbia	316,927	28,325	8.94%	+9	28	Michigan	3,944,777	214,315	5.43%	+1
3	Connecticut	1,373,068	122,045	8.89%		29	Arizona	2,637,329	142,085	5.39%	+1
4	Maryland	2,261,087	200,074	8.85%	-3	30	Nebraska	764,862	40,549	5.30%	-4
5	Massachusetts	2,686,137	230,932	8.60%	+1	31	Wisconsin	2,359,204	124,968	5.30%	-3
6	Hawaii	484,405	41,063	8.48%	-2	32	Iowa	1,275,070	66,442	5.21%	-8
7	New Hampshire	534,888	42,669	7.98%		33	Ohio	4,686,753	243,608	5.20%	
8	California	13,388,653	1,042,027	7.78%	+2	34	Maine	567,486	29,043	5.12%	
9	Alaska	274,391	21,169	7.71%	-4	35	Nevada	1,115,122	56,748	5.09%	
10	Virginia	3,248,928	248,958	7.66%	-2	36	South Dakota	352,611	17,776	5.04%	
11	Washington	2,919,671	205,446	7.04%	+2	37	North Carolina	4,061,714	201,449	4.96%	+5
12	New York	7,533,370	529,303	7.03%	+5	38	Missouri	2,441,372	120,938	4.95%	-1
13	Colorado	2,251,735	158,073	7.02%	+1	39	Louisiana	1,821,634	89,097	4.89%	+4
14	Minnesota	2,220,975	150,137	6.76%	-2	40	Tennessee	2,646,608	128,738	4.86%	+6
15	Illinois	4,859,251	326,081	6.71%	+3	41	South Carolina	1,988,953	96,084	4.83%	+3
16	Delaware	367,593	24,615	6.70%	-7	42	Montana	446,176	21,530	4.83%	-2
17	Rhode Island	418,295	27,170	6.50%	-1	43	Indiana	2,579,621	122,974	4.77%	-5
18	Utah	999,462	63,870	6.39%	+1	44	Oklahoma	1,543,816	73,325	4.75%	-5
19	Texas	10,131,556	622,065	6.14%	+4	45	New Mexico	809,287	37,520	4.64%	-4
20	Pennsylvania	5,090,306	309,174	6.07%	+2	46	Alabama	1,929,043	87,849	4.55%	+1
21	North Dakota	327,393	19,248	5.88%	-1	47	Idaho	639,110	28,928	4.53%	-2
22	Oregon	1,671,063	97,160	5.81%	+3	48	Kentucky	1,772,382	77,671	4.38%	
23	Vermont	260,607	15,090	5.79%	-2	49	Arkansas	1,181,658	45,985	3.89%	
24	Wyoming	239,441	13,130	5.48%	-9	50	West Virginia	756,671	29,031	3.84%	
25	Florida	8,314,234	454,878	5.47%	+6	51	Mississippi	1,133,149	41,685	3.68%	
26	Kansas	1,140,014	62,073	5.44%	+1		Total	123,942,960	7,698,765	6.21%	

Millionaire Households Per Capita - 2017

2017						2017					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2016	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2016
1	Maryland	2,263,021	178,003	7.87%		27	Kansas	1,144,287	62,168	5.43%	-2
2	New Jersey	3,294,365	258,988	7.86%	+1	28	Wisconsin	2,354,510	127,260	5.40%	
3	Connecticut	1,379,979	106,892	7.75%	-1	29	Michigan	3,939,976	210,957	5.35%	
4	Hawaii	487,708	36,903	7.57%		30	Arizona	2,595,635	137,359	5.29%	
5	Alaska	272,496	20,444	7.50%		31	Florida	8,173,428	427,824	5.23%	+1
6	Massachusetts	2,682,402	198,750	7.41%		32	Georgia	3,854,460	200,395	5.20%	+2
7	New Hampshire	532,376	39,209	7.36%		33	Ohio	4,685,647	243,118	5.19%	-2
8	Virginia	3,242,493	226,167	6.98%		34	Maine	565,293	29,301	5.18%	+1
9	Delaware	365,666	24,212	6.62%	+1	35	Nevada	1,096,916	56,452	5.15%	+2
10	California	13,384,483	885,225	6.61%	+1	36	South Dakota	349,397	17,772	5.09%	-3
11	District of Columbia	312,546	20,534	6.57%	-2	37	Missouri	2,439,229	122,323	5.01%	+1
12	Minnesota	2,206,236	144,944	6.57%		38	Indiana	2,575,466	128,600	4.99%	+2
13	Washington	2,865,392	186,396	6.51%	+1	39	Oklahoma	1,543,599	76,819	4.98%	+2
14	Colorado	2,217,977	143,564	6.47%	-1	40	Montana	441,222	21,953	4.98%	-4
15	Wyoming	240,378	14,989	6.24%	+5	41	New Mexico	810,609	40,031	4.94%	+2
16	Rhode Island	418,815	26,032	6.22%	-1	42	North Carolina	4,019,126	196,094	4.88%	
17	New York	7,568,120	465,479	6.15%	+1	43	Louisiana	1,818,504	88,371	4.86%	-4
18	Illinois	4,886,159	300,142	6.14%	-2	44	South Carolina	1,960,255	94,675	4.83%	
19	Utah	978,826	59,390	6.07%	-2	45	Idaho	625,834	30,110	4.81%	+1
20	North Dakota	327,536	19,662	6.00%	+1	46	Tennessee	2,625,681	122,585	4.67%	-1
21	Vermont	261,095	15,363	5.88%	-2	47	Alabama	1,928,669	88,880	4.61%	
22	Pennsylvania	5,099,166	294,002	5.77%		48	Kentucky	1,768,852	79,205	4.48%	
23	Texas	10,005,417	566,578	5.66%		49	Arkansas	1,178,438	50,106	4.25%	+1
24	Iowa	1,270,566	71,212	5.60%		50	West Virginia	763,797	32,082	4.20%	-1
25	Oregon	1,639,493	89,383	5.45%	+2	51	Mississippi	1,134,578	45,771	4.03%	
26	Nebraska	760,510	41,348	5.44%			Total	123,356,629	7,164,022	5.81%	

Millionaire Households Per Capita - 2016

2016						2016					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2015	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2015
1	Maryland	2,254,798	170,140	7.55%		27	Oregon	1,607,720	82,566	5.14%	+3
2	Connecticut	1,382,565	102,292	7.40%		28	Wisconsin	2,345,698	119,244	5.08%	-
3	New Jersey	3,289,113	242,957	7.39%	+1	29	Michigan	3,929,629	199,628	5.08%	+5
4	Hawaii	483,329	35,540	7.35%	-1	30	Arizona	2,556,662	128,186	5.01%	+5
5	Alaska	271,691	19,426	7.15%		31	Ohio	4,672,122	234,154	5.01%	+5
6	Massachusetts	2,661,460	185,895	6.98%		32	Florida	7,994,749	396,940	4.97%	-1
7	New Hampshire	530,424	36,199	6.82%	-	33	South Dakota	347,865	16,995	4.89%	-7
8	Virginia	3,223,503	213,977	6.64%	-	34	Georgia	3,802,007	185,116	4.87%	+3
9	District of Columbia	305,231	19,289	6.32%	+1	35	Maine	565,157	27,508	4.87%	-6
10	Delaware	361,528	22,686	6.28%	-1	36	Montana	436,087	21,177	4.86%	-3
11	California	13,272,794	832,849	6.27%	+2	37	Nevada	1,075,914	51,816	4.82%	+4
12	Minnesota	2,190,378	135,289	6.18%	-1	38	Missouri	2,428,974	115,929	4.77%	+1
13	Colorado	2,168,001	132,183	6.10%	+1	39	Louisiana	1,807,900	85,656	4.74%	+1
14	Washington	2,813,040	169,701	6.03%	+3	40	Indiana	2,566,592	119,398	4.65%	-2
15	Rhode Island	418,033	25,014	5.98%	+4	41	Oklahoma	1,529,230	71,113	4.65%	+1
16	Illinois	4,893,577	289,153	5.91%	+4	42	North Carolina	3,976,162	183,366	4.61%	+2
17	Utah	960,126	56,692	5.90%	+5	43	New Mexico	810,956	37,361	4.61%	-11
18	New York	7,543,815	444,616	5.89%	-3	44	South Carolina	1,929,505	88,394	4.58%	-1
19	Vermont	261,002	15,132	5.80%	-7	45	Tennessee	2,604,209	117,816	4.52%	-
20	Wyoming	239,631	13,842	5.78%	-4	46	Idaho	617,757	27,649	4.48%	+1
21	North Dakota	324,974	18,063	5.56%	-3	47	Alabama	1,925,510	85,824	4.46%	-1
22	Pennsylvania	5,087,465	282,740	5.56%	-1	48	Kentucky	1,762,621	76,105	4.32%	+1
23	Texas	9,804,313	526,977	5.37%	+2	49	West Virginia	765,836	32,286	4.22%	-1
24	Iowa	1,262,624	67,334	5.33%	-1	50	Arkansas	1,173,625	47,899	4.08%	-
25	Kansas	1,141,184	60,002	5.26%	+2	51	Mississippi	1,134,355	42,807	3.77%	-
26	Nebraska	753,996	39,220	5.20%	-2		Total	122,265,437	6,752,141	5.52%	

Millionaire Households Per Capita - 2015

2015						2015					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2014	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2014
1	Maryland	2,237,507	172,249	7.70%		27	Kansas	1,137,134	57,676	5.07%	-2
2	Connecticut	1,383,854	100,996	7.30%		28	Wisconsin	2,336,787	116,648	4.99%	+1
3	Hawaii	478,317	34,678	7.25%	+1	29	Maine	562,629	27,881	4.96%	-1
4	New Jersey	3,273,605	237,064	7.24%	-1	30	Oregon	1,585,295	78,099	4.93%	+5
5	Alaska	273,225	18,726	6.85%		31	Florida	7,839,517	383,290	4.89%	+1
6	Massachusetts	2,638,781	179,657	6.81%	+1	32	New Mexico	811,365	39,321	4.85%	-2
7	New Hampshire	527,269	35,846	6.80%	+1	33	Montana	431,683	20,899	4.84%	+6
8	Virginia	3,201,996	215,451	6.73%	-2	34	Michigan	3,915,936	188,705	4.82%	-3
9	Delaware	357,328	22,782	6.38%		35	Arizona	2,510,996	120,315	4.79%	-2
10	District of Columbia	299,672	18,861	6.29%		36	Ohio	4,651,051	221,667	4.77%	
11	Minnesota	2,172,362	130,330	6.00%	+5	37	Georgia	3,755,662	175,557	4.67%	+3
12	Vermont	260,540	15,435	5.92%	-1	38	Indiana	2,556,127	118,094	4.62%	+3
13	California	13,097,549	772,555	5.90%		39	Missouri	2,418,499	111,483	4.61%	-5
14	Colorado	2,127,178	124,514	5.85%	+4	40	Louisiana	1,796,638	82,473	4.59%	-2
15	New York	7,502,148	437,889	5.84%		41	Nevada	1,054,251	48,230	4.57%	-4
16	Wyoming	240,400	14,016	5.83%	+1	42	Oklahoma	1,520,327	69,158	4.55%	
17	Washington	2,770,334	161,220	5.82%	-3	43	South Carolina	1,899,618	85,731	4.51%	+1
18	North Dakota	318,190	18,492	5.81%	+2	44	North Carolina	3,936,705	177,291	4.50%	-1
19	Rhode Island	416,126	24,162	5.81%	-7	45	Tennessee	2,580,393	114,295	4.43%	+2
20	Illinois	4,894,599	280,266	5.73%	-1	46	Alabama	1,919,962	84,802	4.42%	-1
21	Pennsylvania	5,078,566	275,792	5.43%		47	Idaho	606,752	26,555	4.38%	+3
22	Utah	945,290	50,903	5.38%	+2	48	West Virginia	767,361	33,259	4.33%	-2
23	Iowa	1,253,520	66,285	5.29%		49	Kentucky	1,756,596	74,389	4.23%	-1
24	Nebraska	748,590	39,007	5.21%	-2	50	Arkansas	1,171,886	48,457	4.13%	-1
25	Texas	9,600,635	490,634	5.11%	+2	51	Mississippi	1,133,798	44,626	3.94%	
26	South Dakota	344,608	17,487	5.07%			Total	121,099,157	6,504,201	5.37%	

Millionaire Households Per Capita - 2014

2014						2014					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2013	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2013
1	Maryland	2,220,791	170,249	7.67%		27	Texas	9,468,956	468,392	4.95%	-5
2	Connecticut	1,382,026	99,966	7.23%	+1	28	Maine	561,964	27,322	4.86%	-3
3	New Jersey	3,258,464	232,514	7.14%	-1	29	Wisconsin	2,323,821	111,358	4.79%	-1
4	Hawaii	473,750	32,829	6.93%		30	New Mexico	812,909	38,166	4.69%	-3
5	Alaska	272,762	18,604	6.82%		31	Michigan	3,899,340	180,615	4.63%	+6
6	Virginia	3,173,330	214,361	6.76%	+1	32	Florida	7,745,850	358,191	4.62%	-2
7	Massachusetts	2,612,989	174,114	6.66%	-1	33	Arizona	2,482,555	114,684	4.62%	+1
8	New Hampshire	525,490	34,921	6.65%		34	Missouri	2,404,069	110,431	4.59%	-1
9	Delaware	353,887	22,905	6.47%		35	Oregon	1,571,253	71,562	4.55%	-4
10	District of Columbia	292,398	18,267	6.25%		36	Ohio	4,628,997	210,611	4.55%	
11	Vermont	259,036	15,168	5.86%	+7	37	Nevada	1,042,754	46,560	4.47%	+2
12	Rhode Island	414,114	24,056	5.81%	+5	38	Louisiana	1,785,263	79,685	4.46%	-6
13	California	13,003,529	753,143	5.79%	-2	39	Montana	425,089	18,885	4.44%	+1
14	Washington	2,737,011	156,817	5.73%	-1	40	Georgia	3,734,136	165,705	4.44%	-5
15	New York	7,461,926	427,147	5.72%	-3	41	Indiana	2,537,304	111,631	4.40%	+4
16	Minnesota	2,147,610	122,862	5.72%	-2	42	Oklahoma	1,503,685	65,833	4.38%	
17	Wyoming	237,891	13,544	5.69%	+3	43	North Carolina	3,895,324	170,501	4.38%	+1
18	Colorado	2,088,780	118,293	5.66%	-2	44	South Carolina	1,874,994	81,692	4.36%	-1
19	Illinois	4,886,204	266,470	5.45%	-4	45	Alabama	1,915,162	82,914	4.33%	-4
20	North Dakota	304,160	16,518	5.43%	+9	46	West Virginia	767,977	32,512	4.23%	+2
21	Pennsylvania	5,073,114	268,233	5.29%	-2	47	Tennessee	2,568,174	107,536	4.19%	-1
22	Nebraska	742,572	38,535	5.19%	+2	48	Kentucky	1,749,227	72,374	4.14%	-1
23	Iowa	1,242,912	64,047	5.15%	+3	49	Arkansas	1,167,613	46,813	4.01%	+1
24	Utah	928,729	47,663	5.13%	-3	50	Idaho	598,428	23,975	4.01%	-1
25	Kansas	1,135,195	56,618	4.99%	-2	51	Mississippi	1,131,479	43,138	3.81%	
26	South Dakota	338,312	16,742	4.95%	+12		Total	120,163,305	6,265,668	5.21%	

Millionaire Households Per Capita - 2013

2013						2013					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2012	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2012
1	Maryland	2,199,912	169,287	7.70%		27	New Mexico	815,453	37,957	4.65%	+7
2	New Jersey	3,238,448	242,647	7.49%	+1	28	Wisconsin	2,312,821	106,647	4.61%	+1
3	Connecticut	1,376,955	100,754	7.32%	+1	29	North Dakota	293,994	13,494	4.59%	+14
4	Hawaii	466,705	33,520	7.18%	-2	30	Florida	7,631,375	348,623	4.57%	-10
5	Alaska	269,890	18,209	6.75%	+1	31	Oregon	1,559,406	70,731	4.54%	-6
6	Massachusetts	2,587,868	174,225	6.73%	-1	32	Louisiana	1,774,060	79,681	4.49%	+10
7	Virginia	3,137,169	208,187	6.64%		33	Missouri	2,399,696	106,390	4.43%	+2
8	New Hampshire	522,867	33,867	6.48%	+1	34	Arizona	2,453,991	108,682	4.43%	-13
9	Delaware	349,794	21,679	6.20%	+2	35	Georgia	3,694,439	163,144	4.42%	-5
10	District of Columbia	284,867	17,378	6.10%		36	Ohio	4,625,934	204,121	4.41%	-4
11	California	12,883,977	777,624	6.04%	-3	37	Michigan	3,883,070	169,991	4.38%	-10
12	New York	7,408,730	429,153	5.79%		38	South Dakota	333,001	14,553	4.37%	+8
13	Washington	2,711,326	155,668	5.74%		39	Nevada	1,022,478	44,437	4.35%	-20
14	Minnesota	2,131,481	118,410	5.56%	+3	40	Montana	420,800	18,106	4.30%	+4
15	Illinois	4,884,048	270,414	5.54%		41	Alabama	1,905,886	80,138	4.20%	+1
16	Colorado	2,057,819	113,914	5.54%		42	Oklahoma	1,496,646	62,233	4.16%	+5
17	Rhode Island	413,196	22,845	5.53%	-1	43	South Carolina	1,852,786	76,831	4.15%	-5
18	Vermont	259,015	13,630	5.26%	+4	44	North Carolina	3,853,043	158,447	4.11%	-4
19	Pennsylvania	5,060,354	265,350	5.24%	+5	45	Indiana	2,532,022	101,789	4.02%	-8
20	Wyoming	231,877	12,058	5.20%	+3	46	Tennessee	2,542,865	101,465	3.99%	-1
21	Utah	917,043	45,393	4.95%	-3	47	Kentucky	1,748,832	67,068	3.84%	+1
22	Texas	9,336,438	456,949	4.89%	+4	48	West Virginia	767,945	29,367	3.82%	+1
23	Kansas	1,128,776	54,266	4.81%	+5	49	Idaho	595,106	22,379	3.76%	-10
24	Nebraska	736,877	34,916	4.74%	+7	50	Arkansas	1,167,428	43,588	3.73%	+1
25	Maine	560,006	26,276	4.69%	+11	51	Mississippi	1,128,842	40,955	3.63%	
26	Iowa	1,239,152	58,095	4.69%	+7		Total	119,206,509	6,145,533	5.16%	

Millionaire Households Per Capita - 2012

2012						2012					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2011	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2011
1	Maryland	2,179,476	159,286	7.31%		27	Michigan	3,866,579	179,863	4.65%	-1
2	Hawaii	461,438	33,639	7.29%		28	Kansas	1,127,021	52,320	4.64%	
3	New Jersey	3,236,020	235,292	7.27%		29	Wisconsin	2,308,632	106,841	4.63%	+1
4	Connecticut	1,375,455	99,235	7.21%		30	Georgia	3,678,015	170,103	4.62%	-1
5	Massachusetts	2,569,813	167,415	6.51%		31	Nebraska	733,567	32,456	4.42%	+1
6	Alaska	264,748	17,133	6.47%		32	Ohio	4,609,230	203,706	4.42%	-1
7	Virginia	3,123,109	198,516	6.36%		33	Iowa	1,236,060	54,514	4.41%	
8	California	12,732,704	774,901	6.09%	-1	34	New Mexico	814,583	35,611	4.37%	
9	New Hampshire	527,206	32,084	6.09%		35	Missouri	2,411,179	105,073	4.36%	
10	District of Columbia	271,604	16,353	6.02%		36	Maine	567,259	24,264	4.28%	
11	Delaware	346,716	20,358	5.87%		37	Indiana	2,529,002	107,667	4.26%	
12	New York	7,386,838	419,264	5.68%		38	South Carolina	1,851,610	78,000	4.21%	
13	Washington	2,680,136	148,333	5.53%		39	Idaho	598,595	25,144	4.20%	
14	Colorado	2,019,541	111,534	5.52%		40	North Carolina	3,851,922	160,332	4.16%	
15	Illinois	4,878,682	268,487	5.50%		41	Louisiana	1,757,184	72,719	4.14%	
16	Rhode Island	414,761	22,625	5.45%		42	Alabama	1,915,290	77,794	4.06%	+1
17	Minnesota	2,121,163	115,575	5.45%		43	North Dakota	287,989	11,697	4.06%	+2
18	Utah	908,892	47,053	5.18%	+2	44	Montana	418,939	17,010	4.06%	-2
19	Nevada	1,029,249	52,817	5.13%	-1	45	Tennessee	2,530,432	102,015	4.03%	-1
20	Florida	7,531,011	379,018	5.03%	-1	46	South Dakota	330,712	13,299	4.02%	
21	Arizona	2,439,788	122,268	5.01%		47	Oklahoma	1,491,445	59,472	3.99%	
22	Vermont	260,344	13,042	5.01%		48	Kentucky	1,748,150	66,242	3.79%	
23	Wyoming	233,725	11,629	4.98%		49	West Virginia	776,129	27,921	3.60%	
24	Pennsylvania	5,071,561	252,159	4.97%		50	Mississippi	1,134,074	39,606	3.49%	+1
25	Oregon	1,548,803	73,731	4.76%		51	Arkansas	1,173,353	40,790	3.48%	-1
26	Texas	9,222,834	436,377	4.73%	+1		Total	118,582,568	6,092,585	5.14%	

Millionaire Households Per Capita - 2011

2011						2011					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2010	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2010
1	Maryland	2,186,613	157,779	7.22%	+1	27	Texas	8,962,137	417,050	4.65%	-1
2	Hawaii	464,352	33,461	7.21%	-1	28	Kansas	1,115,078	51,224	4.59%	+2
3	New Jersey	3,220,564	231,456	7.19%		29	Georgia	3,579,336	164,373	4.59%	
4	Connecticut	1,379,723	98,392	7.13%		30	Wisconsin	2,272,648	104,274	4.59%	-2
5	Massachusetts	2,538,474	162,619	6.41%		31	Ohio	4,599,428	202,275	4.40%	+1
6	Alaska	254,103	16,239	6.39%		32	Nebraska	720,196	31,617	4.39%	-1
7	Virginia	3,113,444	195,006	6.26%		33	Iowa	1,218,013	52,790	4.33%	
8	New Hampshire	514,053	31,159	6.06%		34	New Mexico	791,585	34,157	4.31%	
9	California	12,487,377	750,686	6.01%		35	Missouri	2,393,887	102,959	4.30%	
10	District of Columbia	265,558	15,603	5.88%		36	Maine	561,667	23,865	4.25%	
11	Delaware	348,774	20,140	5.77%		37	Indiana	2,537,932	107,325	4.23%	+1
12	New York	7,196,816	403,307	5.60%		38	South Carolina	1,837,173	76,659	4.17%	+1
13	Washington	2,626,668	143,706	5.47%		39	Idaho	580,509	24,069	4.15%	-2
14	Colorado	1,947,817	106,216	5.45%	+3	40	North Carolina	3,793,073	156,947	4.14%	+1
15	Illinois	4,750,715	258,196	5.43%		41	Louisiana	1,723,955	70,042	4.06%	+1
16	Rhode Island	412,524	22,242	5.39%	-2	42	Montana	401,485	16,178	4.03%	-2
17	Minnesota	2,086,981	112,438	5.39%	-1	43	Alabama	1,922,895	76,986	4.00%	
18	Nevada	1,014,693	51,565	5.08%		44	Tennessee	2,555,775	101,604	3.98%	
19	Florida	7,492,687	376,343	5.02%		45	North Dakota	278,346	10,979	3.94%	+2
20	Utah	881,354	44,258	5.02%	+2	46	South Dakota	320,197	12,624	3.94%	-1
21	Arizona	2,374,847	117,843	4.96%		47	Oklahoma	1,477,983	58,148	3.93%	-1
22	Vermont	255,194	12,603	4.94%	+1	48	Kentucky	1,766,302	65,762	3.72%	
23	Wyoming	229,436	11,271	4.91%	-3	49	West Virginia	782,528	27,892	3.56%	
24	Pennsylvania	5,018,137	246,131	4.90%		50	Arkansas	1,157,400	39,749	3.43%	
25	Oregon	1,506,264	70,868	4.70%		51	Mississippi	1,124,672	38,574	3.43%	
26	Michigan	3,821,022	178,322	4.67%	+1		Total	116,862,390	5,935,973	5.08%	

Millionaire Households Per Capita - 2010

2010						2010					
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2009	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	VS. 2009
1	Hawaii	444,202	30,793	6.93%	-	27	Michigan	3,846,728	166,611	4.33%	-1
2	Maryland	2,129,773	144,686	6.79%	-	28	Wisconsin	2,252,664	97,266	4.32%	-1
3	New Jersey	3,175,894	212,396	6.69%	-	29	Georgia	3,639,796	156,943	4.31%	-
4	Connecticut	1,347,693	89,647	6.65%	-	30	Kansas	1,096,736	47,226	4.31%	-
5	Massachusetts	2,521,928	150,844	5.98%	+1	31	Nebraska	704,049	29,272	4.16%	+2
6	Alaska	248,009	14,805	5.97%	+1	32	Ohio	4,566,369	188,908	4.14%	-1
7	Virginia	3,043,091	180,638	5.94%	-2	33	Iowa	1,204,906	49,451	4.10%	-1
8	New Hampshire	514,667	29,790	5.79%	-	34	New Mexico	766,050	31,145	4.07%	+2
9	California	12,653,856	716,316	5.66%	-	35	Missouri	2,364,933	95,312	4.03%	-1
10	District of Columbia	262,976	14,533	5.53%	-	36	Maine	553,493	22,191	4.01%	-1
11	Delaware	343,322	18,412	5.36%	-	37	Idaho	575,621	22,917	3.98%	+2
12	New York	7,263,927	381,197	5.25%	-	38	Indiana	2,501,280	99,440	3.98%	-1
13	Washington	2,577,274	133,582	5.18%	-	39	South Carolina	1,802,904	71,114	3.94%	-1
14	Rhode Island	409,575	20,873	5.10%	+1	40	Montana	394,196	15,491	3.93%	-
15	Illinois	4,800,176	242,536	5.05%	+1	41	North Carolina	3,725,318	144,029	3.87%	-
16	Minnesota	2,057,554	103,641	5.04%	+2	42	Louisiana	1,701,745	65,382	3.84%	+1
17	Colorado	1,949,583	98,085	5.03%	-	43	Alabama	1,881,966	71,224	3.78%	-1
18	Nevada	990,855	48,220	4.87%	-4	44	Tennessee	2,519,914	94,560	3.75%	-
19	Florida	7,455,767	362,285	4.86%	-	45	South Dakota	317,030	11,865	3.74%	+2
20	Wyoming	219,309	10,631	4.85%	+1	46	Oklahoma	1,442,985	53,910	3.74%	-1
21	Arizona	2,458,106	117,094	4.76%	-1	47	North Dakota	265,786	9,907	3.73%	-1
22	Utah	891,901	42,238	4.74%	-	48	Kentucky	1,743,587	61,315	3.52%	-
23	Vermont	252,584	11,806	4.67%	-	49	West Virginia	761,493	26,090	3.43%	-
24	Pennsylvania	4,934,144	227,680	4.61%	-	50	Arkansas	1,138,318	36,854	3.24%	-
25	Oregon	1,513,336	66,839	4.42%	-	51	Mississippi	1,113,217	35,847	3.22%	-
26	Texas	8,796,031	381,165	4.33%	+2		Total	116,136,617	5,555,002	4.78%	

Millionaire Households Per Capita - 2009

2009					2009				
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH
1	Hawaii	442,144	28,363	6.41%	27	Wisconsin	2,244,127	89,977	4.01%
2	Maryland	2,128,530	133,299	6.26%	28	Texas	8,650,034	346,302	4.00%
3	New Jersey	3,178,888	197,694	6.22%	29	Georgia	3,600,149	143,957	4.00%
4	Connecticut	1,346,850	82,837	6.15%	30	Kansas	1,085,567	43,205	3.98%
5	Virginia	3,024,189	166,596	5.51%	31	Ohio	4,563,201	177,512	3.89%
6	Massachusetts	2,504,234	137,792	5.50%	32	Iowa	1,197,795	45,898	3.83%
7	Alaska	247,663	13,348	5.39%	33	Nebraska	701,132	26,740	3.81%
8	New Hampshire	515,887	27,562	5.34%	34	Missouri	2,354,198	89,230	3.79%
9	California	12,553,966	662,735	5.28%	35	Maine	555,250	20,997	3.78%
10	District of Columbia	260,749	13,028	5.00%	36	New Mexico	762,688	28,666	3.76%
11	Delaware	340,003	16,763	4.93%	37	Indiana	2,491,917	93,649	3.76%
12	New York	7,184,280	345,892	4.81%	38	South Carolina	1,772,822	66,240	3.74%
13	Washington	2,547,695	122,520	4.81%	39	Idaho	567,995	21,121	3.72%
14	Nevada	987,894	46,175	4.67%	40	Montana	390,043	14,474	3.71%
15	Rhode Island	412,348	19,272	4.67%	41	North Carolina	3,660,988	133,648	3.65%
16	Illinois	4,787,419	223,636	4.67%	42	Alabama	1,867,713	66,314	3.55%
17	Colorado	1,909,037	89,092	4.67%	43	Louisiana	1,685,517	59,747	3.54%
18	Minnesota	2,049,845	95,321	4.65%	44	Tennessee	2,499,453	88,284	3.53%
19	Florida	7,458,092	344,842	4.62%	45	Oklahoma	1,432,405	50,304	3.51%
20	Arizona	2,415,231	107,355	4.44%	46	North Dakota	264,968	9,051	3.42%
21	Wyoming	214,423	9,489	4.43%	47	South Dakota	314,151	10,646	3.39%
22	Utah	863,310	37,369	4.33%	48	Kentucky	1,731,384	57,059	3.30%
23	Vermont	253,344	10,941	4.32%	49	West Virginia	759,823	24,941	3.28%
24	Pennsylvania	4,907,949	211,162	4.30%	50	Arkansas	1,131,312	35,286	3.12%
25	Oregon	1,495,882	61,621	4.12%	51	Mississippi	1,105,187	33,792	3.06%
26	Michigan	3,886,432	157,642	4.06%		Total	115,306,103	5,139,385	4.46%

Millionaire Households Per Capita - 2008

2008					2008				
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH
1	Hawaii	442,274	32,103	7.26%	27	Kansas	1,082,385	47,613	4.40%
2	Maryland	2,144,808	148,395	6.92%	28	Wisconsin	2,233,105	98,109	4.39%
3	New Jersey	3,199,900	220,372	6.89%	29	Georgia	3,548,295	153,975	4.34%
4	Connecticut	1,353,564	92,282	6.82%	30	Texas	8,469,530	362,693	4.28%
5	Massachusetts	2,502,147	150,906	6.03%	31	Nebraska	702,723	30,013	4.27%
6	Virginia	3,003,153	179,752	5.99%	32	New Mexico	755,993	32,274	4.27%
7	California	12,588,862	722,681	5.74%	33	Ohio	4,573,875	193,712	4.24%
8	District of Columbia	257,819	14,781	5.73%	34	Iowa	1,200,922	50,214	4.18%
9	New Hampshire	518,560	29,277	5.65%	35	Missouri	2,349,919	97,030	4.13%
10	Alaska	242,687	13,417	5.53%	36	Maine	559,364	23,068	4.12%
11	Delaware	334,883	18,322	5.47%	37	Indiana	2,484,730	101,987	4.10%
12	New York	7,204,492	379,745	5.27%	38	South Carolina	1,734,072	70,185	4.05%
13	Florida	7,398,258	386,077	5.22%	39	North Carolina	3,573,460	143,984	4.03%
14	Rhode Island	416,379	21,698	5.21%	40	Alabama	1,859,096	74,162	3.99%
15	Illinois	4,786,787	247,165	5.16%	41	South Dakota	308,611	12,151	3.94%
16	Minnesota	2,040,608	104,435	5.12%	42	Montana	385,847	15,149	3.93%
17	Nevada	980,068	49,574	5.06%	43	Louisiana	1,660,624	65,163	3.92%
18	Washington	2,526,352	127,726	5.06%	44	Idaho	556,843	21,739	3.90%
19	Colorado	1,877,779	93,605	4.98%	45	Tennessee	2,454,617	95,024	3.87%
20	Arizona	2,374,996	114,744	4.83%	46	North Dakota	263,107	10,148	3.86%
21	Pennsylvania	4,916,414	233,349	4.75%	47	Oklahoma	1,421,631	53,689	3.78%
22	Vermont	254,932	11,967	4.69%	48	Kentucky	1,718,125	63,991	3.72%
23	Michigan	3,916,061	181,748	4.64%	49	West Virginia	762,655	27,629	3.62%
24	Wyoming	209,951	9,735	4.64%	50	Arkansas	1,129,118	39,597	3.51%
25	Oregon	1,480,382	66,590	4.50%	51	Mississippi	1,097,900	37,170	3.39%
26	Utah	835,538	37,074	4.44%		Total	114,694,201	5,607,989	4.89%

Millionaire Households Per Capita - 2007

2007					2007				
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH
1	New Jersey	3,210,592	228,442	7.12%	27	Wyoming	207,248	10,160	4.90%
2	Maryland	2,143,128	151,756	7.08%	28	Ohio	4,578,456	224,305	4.90%
3	Connecticut	1,358,170	95,028	7.00%	29	Oregon	1,456,021	71,046	4.88%
4	Hawaii	438,893	29,365	6.69%	30	Kansas	1,075,666	51,580	4.80%
5	Massachusetts	2,493,707	156,208	6.26%	31	Indiana	2,468,351	118,306	4.79%
6	Virginia	2,979,225	186,576	6.26%	32	Texas	8,333,041	393,640	4.72%
7	Delaware	333,263	20,274	6.08%	33	Iowa	1,191,013	56,235	4.72%
8	Alaska	240,842	14,594	6.06%	34	Nebraska	697,600	32,896	4.72%
9	New Hampshire	517,725	30,918	5.97%	35	Missouri	2,330,315	109,256	4.69%
10	California	12,461,651	720,733	5.78%	36	Maine	557,043	25,960	4.66%
11	Colorado	1,841,538	105,351	5.72%	37	New Mexico	750,428	34,610	4.61%
12	Minnesota	2,026,451	115,587	5.70%	38	South Carolina	1,704,376	78,285	4.59%
13	Illinois	4,760,856	269,098	5.65%	39	North Carolina	3,496,649	160,307	4.58%
14	Michigan	3,936,519	214,069	5.44%	40	Alabama	1,841,006	81,994	4.45%
15	Washington	2,489,441	133,812	5.38%	41	Tennessee	2,415,110	107,355	4.45%
16	Nevada	952,864	51,153	5.37%	42	Idaho	540,847	23,652	4.37%
17	Rhode Island	424,216	22,550	5.32%	43	Montana	382,778	16,511	4.31%
18	Florida	7,308,878	387,886	5.31%	44	Louisiana	1,632,824	69,296	4.24%
19	New York	7,235,413	381,786	5.28%	45	Kentucky	1,699,590	70,720	4.16%
20	District of Columbia	261,792	13,776	5.26%	46	Oklahoma	1,406,412	57,789	4.11%
21	Arizona	2,297,734	120,116	5.23%	47	South Dakota	306,176	12,563	4.10%
22	Vermont	253,582	13,163	5.19%	48	North Dakota	262,501	10,763	4.10%
23	Pennsylvania	4,916,948	252,326	5.13%	49	West Virginia	759,937	30,374	4.00%
24	Wisconsin	2,228,294	112,692	5.06%	50	Arkansas	1,112,643	43,533	3.91%
25	Utah	801,821	39,670	4.95%	51	Mississippi	1,108,629	42,703	3.85%
26	Georgia	3,439,800	170,160	4.95%		Total	113,668,003	5,970,929	5.25%

Millionaire Households Per Capita - 2006

2006					2006				
Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH	Rank	State	Total Households	\$1MM+ Investable Assets	Ratio Millionaires to Total HH
1	Hawaii	433,434	29,423	6.79%	27	Kansas	1,067,289	47,855	4.48%
2	New Jersey	3,216,409	207,693	6.46%	28	Ohio	4,570,485	203,404	4.45%
3	Maryland	2,131,079	132,354	6.21%	29	Nebraska	691,597	29,862	4.32%
4	Connecticut	1,362,862	84,508	6.20%	30	Texas	8,166,147	350,727	4.29%
5	Massachusetts	2,504,160	141,186	5.64%	31	Iowa	1,177,646	50,529	4.29%
6	Delaware	327,419	17,939	5.48%	32	Missouri	2,298,770	98,279	4.28%
7	Virginia	2,924,931	159,395	5.45%	33	Indiana	2,448,619	104,539	4.27%
8	California	12,284,895	663,394	5.40%	34	Georgia	3,325,526	141,701	4.26%
9	District of Columbia	241,391	12,871	5.33%	35	Wyoming	205,596	8,708	4.24%
10	Florida	7,127,034	369,912	5.19%	36	New Mexico	734,374	30,891	4.21%
11	New Hampshire	513,923	26,498	5.16%	37	North Carolina	3,418,306	140,501	4.11%
12	Illinois	4,744,796	243,350	5.13%	38	South Carolina	1,672,113	68,178	4.08%
13	New York	7,199,377	368,388	5.12%	39	Maine	555,597	22,218	4.00%
14	Alaska	237,884	12,167	5.11%	40	Alabama	1,819,184	72,299	3.97%
15	Colorado	1,800,350	89,896	4.99%	41	Tennessee	2,377,191	94,419	3.97%
16	Minnesota	2,003,498	99,246	4.95%	42	Idaho	521,117	20,493	3.93%
17	Washington	2,432,897	118,132	4.86%	43	North Dakota	259,464	10,163	3.92%
18	Michigan	3,933,380	190,871	4.85%	44	South Dakota	302,493	11,769	3.89%
19	Arizona	2,211,235	105,722	4.78%	45	Oklahoma	1,391,521	53,939	3.88%
20	Rhode Island	428,941	20,229	4.72%	46	Louisiana	1,714,653	64,972	3.79%
21	Nevada	914,852	42,888	4.69%	47	Montana	378,242	14,155	3.74%
22	Utah	778,058	36,348	4.67%	48	Arkansas	1,098,280	40,756	3.71%
23	Pennsylvania	4,903,270	228,270	4.66%	49	Kentucky	1,681,818	62,394	3.71%
24	Wisconsin	2,202,207	99,976	4.54%	50	West Virginia	759,126	27,302	3.60%
25	Vermont	252,526	11,390	4.51%	51	Mississippi	1,096,166	39,270	3.58%
26	Oregon	1,425,174	63,943	4.49%		Total	112,267,302	5,385,315	4.80%

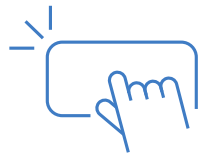
A nighttime photograph of a city skyline with several illuminated skyscrapers. In the foreground, a multi-lane highway is shown with long-exposure light trails from cars, creating streaks of white and yellow light. The sky is dark, and the city lights provide a strong contrast.

What is the Phoenix Wealth & Affluent Monitor?

More About the Phoenix Wealth & Affluent Monitor

OUR RETAIL INVESTOR INTELLIGENCE PLATFORM

Since 2003, the Phoenix Wealth & Affluent Monitor, our large-scale syndicated tracking program, has provided continuous and comprehensive tactical and strategic intelligence from retail investors to the wealth management industry.



Monthly fielding via online modules

- 1,000 qualified affluent and HNW investors per month / roughly 12,000 annually
- Modular questionnaire design to maximize content coverage and data relevance
- Subscribers can add proprietary questions six times per year



Deliverables to meet your needs

- Annual, quarterly and monthly reporting
- Including client-customized Web-based interactive dashboards
- Analyst support
- Custom data segmentation

W&AM insights are applied to strategic and tactical decisions in multiple ways:

- Deepening client relationships, improving retention, new client acquisition
- Assessing institution and advisor strengths/weaknesses relative to key competitors
- Improving targeting of clients and prospects
- Strengthening market positioning and communications
- Knowing what matters among various segment cuts
- Understanding and tracking consumer sentiment
- Staying on top of current market trends and current issues



THANK YOU

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