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Passive activity: Millennials and financial advisory

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Abstract

The purpose of this research is to study usage and knowledge of passive financial advisory. Using a unique survey on passive investing that gathered information on how

people use and understand passive financial advisory, the study analyzes the relationship

Degree Discipline

between passive financial advisory usage and generation. Results indicate that

Millennials use passive financial advisory at a higher rate than Generation X, but there is

Degree Name

no significant difference between Millennials and Baby Boomers. Millennials show a

higher level of knowledge and management of passive fund management compared to

Degree Level

other generations. Further, there is no significant difference in openness to passive

financial advisory among those who do not use it.

Type

dissertation or thesis