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Applied Economics and Management

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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 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 no significant difference between Millennials and Baby Boomers. Millennials show a significantly higher likelihood of passive fund management compared to other generations. Further, there is no significant difference in openness to passive financial advisory by generation among those who do not use it.

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