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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 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 higher level of knowledge of passive fund management compared to other generations. Further, there is no significant difference in openness to passive financial advisory among those who do not use it.

Date Issued

2008-05

Degree Discipline

Applied Economics and Management

Degree Name

M.A. Applied Economics and Management

Degree Level

Master of Professional Studies

Type

dissertation or thesis