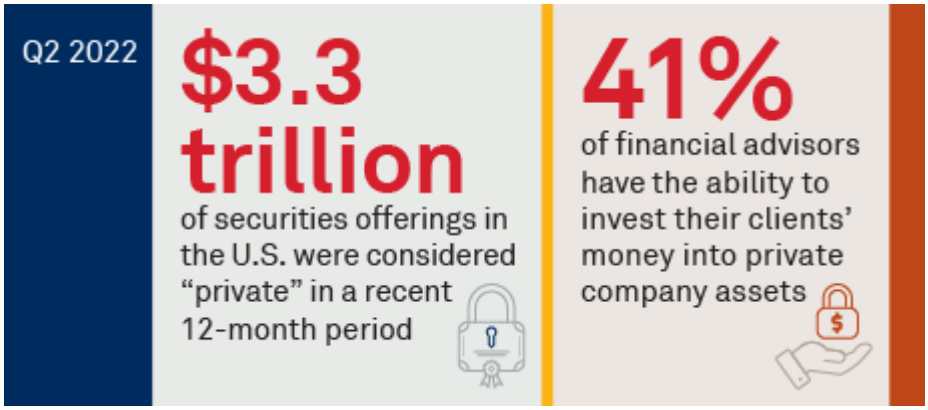
Private Investments Are Accessible but Not Always Suitable for Retail Investors

May 3, 2022

Executive Summary:



The search for yield and an abundance of fast-growing startups have left even mass-market investors clamoring for the opportunity to invest in private companies. Blockchain and other similar technologies have further catalyzed demand by offering easier access to these unlisted securities (not to mention fractional ownership of art, horses and commercial real estate). These factors combined have turbocharged both supply and demand, creating new investment opportunities for regular investors that would have seemed out of reach only a few years ago.

Methodology:

In January 2022, Coalition Greenwich gathered responses from 669 financial advisors in the United States, with the majority of those advisors targeting both HNW and very affluent clients. Topics included digital assets, technology usage, client interactions, and views on new investment vehicles.

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