



Market Different (to the UHNW)

WWW.WEALTHX.COM

Wealth-X Overview

About Wealth-X

VISION

To create a perfect market between those individuals with substantial financial means and those with authentic reasons to engage them

MISSION

To help Luxury Brands, Private Wealth Managers and Non-Profits better serve their existing key revenue clients and proactively engage their “Future Clients” through bespoke sales and marketing strategies driven by the most curated wealth intelligence

CORE VALUES

Service, Integrity, Authority, Understanding, Discretion, Partnership

Factsheet

8/10



Of top 10 Global Private Banks are Clients

600 +

More Billionaires Identified than Forbes



Countries Included

225,000

Average Weekly Database Changes

165 +

Highly-Trained Researchers

200 +

Global Staff

16,151,749

Data Points

33



Languages Spoken by Staff

How We Work

Publicly Available Sources

Online and offline, paid and free, to source our information in many languages; no interviews; no phone calls

Thousand of Sources

Paid search tools to free search magazines, newspapers, global stock exchanges, public filings and more

Financial Analyses

Dizzying array of forensic accounting, modeling, and private company valuations

Our Clients

250+

Clients

20

Countries

94%

Renewal Rate

56%

Upgrade Rate

Located in every major business center from New York to Singapore.

Private Banks, Luxury Brands, Academic Institutions, Non-Profit Organizations, Aircraft Manufacturers, Auction Houses, Investment Banks, Yacht Builders, Multi Family Offices, Luxury Retailers, Private Equity Firms and Lobbying Groups.

Bespoke Intelligence Dossier

Every word in a Wealth-X dossier is meticulously crafted by hand. Our researchers review thousands of sources and only include that which has been verified from at least two publicly available sources.

102

Distinct Fields

19

Sections

1.5

Days to Create

5.9

Days Turnaround

BACKGROUND

BIOGRAPHY

CAREER

HISTORY

EDUCATION

HISTORY

INTERESTING FACTS

WEALTH ANALYSIS

INTERESTS, PASSIONS, HOBBIES

PHILANTHROPY

CLUBS & BOARDS

KNOWN ASSOCIATES

SERVICE PROVIDERS

FAMILY DETAILS

NEWS

POLITICAL INTERESTS

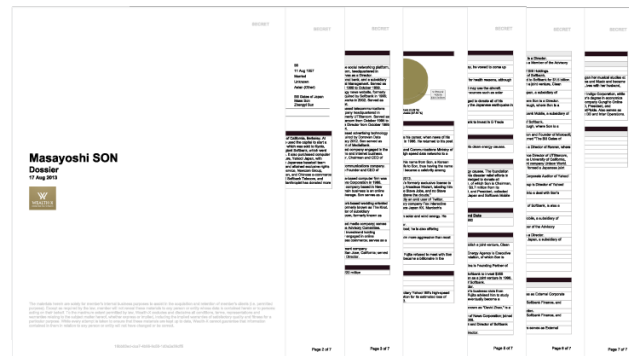
BANKRUPTCY

SIGNIFICANT LITIGATION

PRIVATE FOUNDATION

FAMILY OFFICES

BUSINESS CONTACT INFORMATION



Masayoshi SON
Dossier
17 Aug 2015

The screenshot displays a multi-column layout of a dossier for Masayoshi SON. The left column contains a list of sections. The main area is divided into several columns, each with a header and content. The sections visible include: BACKGROUND, BIOGRAPHY, CAREER, HISTORY, EDUCATION, HISTORY, INTERESTING FACTS, WEALTH ANALYSIS, INTERESTS, PASSIONS, HOBBIES, PHILANTHROPY, CLUBS & BOARDS, KNOWN ASSOCIATES, SERVICE PROVIDERS, FAMILY DETAILS, NEWS, POLITICAL INTERESTS, BANKRUPTCY, SIGNIFICANT LITIGATION, PRIVATE FOUNDATION, FAMILY OFFICES, and BUSINESS CONTACT INFORMATION. The content is presented in a structured, tabular format with various sub-sections and data points.

Noted Expertise



Our Authority In The News



The Ultra-Wealthy Are Different and They Express Themselves Differently

More Money

- There are key differences between the mass affluent, high net worth and the ultra high net worth and the super rich...
- One of them: More money in their bank account



Some local municipalities have larger budgets...



...And even larger budgets.

Abu Dhabi Police Completes Fleet Of Cars With Super-Rare Lykan Hypersport

Friday, June 5, 2015 at 4:32 pm | Posted by **Bogdan Zoltan**

FILED UNDER **FEATURED** **LYKAN HYPERSPORT** **OFFBEAT NEWS** **POLICE CARS** **VIDEO**

8 Comments

G+ +3 Recommend this

f Like

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Chinese Wealth

3:32 pm HKT
Jul 21, 2014

CULTURE

Chinese Art Collector Stirs Pot With Sip of Tea from \$36-Million Cup

ARTICLE

COMMENTS (7)

ART SOTHEBY'S

Email Print



London Super Homes

Property. Prime housing

Rich turn London flats into 'super' homes

Applications to redesign have more than quadrupled in one wealthy borough of the capital

LUCY WARWICK-CHING

A vogue for joining together expensive properties in some of the UK's most desirable addresses has been gathering momentum as wealthy Londoners and international homeowners rush to create "super prime" family homes.

Planning applications to amalgamate properties into a single dwelling have more than quadrupled in Kensington and Chelsea since 2010. Last year the London borough reported 68 applications for such developments, including proposals to combine flats into family homes to create extra space for gyms, wine cellars and spas as well as more bedrooms and living space. In a market where supply is limited and where it is increasingly difficult to dig out basements and add extensions, owners are coming up with new ways to increase their property's footprint, said Ollie Hooper, director at Huntly Hooper, which specialises in advising buyers and investors in central London residential property. "Buyers in prime central London are adapting to recent changes in planning policies that have started restricting the expansion of space above and below ground," he said.

Kensington and Chelsea council has ruled it will no longer approve basements of more than one storey, for instance. The extent to which underground extensions can stretch beneath the garden has also been reduced, from 25 per cent of the garden area to 50 per



An applicant

Gloucester Street, also represents a deal in the market, but it is

at 11.5 million, a price that is

among the trend. West London

Few More Stories to Start

- Bloomberg Luxury Panel on New UHNW Client Acquisition
- Salesforce – Marc Benioff – Berluti
- Exotic Instruments – American living in Hong Kong
- Yacht parked on a golf course in China
- Seasoned American entrepreneur with recent liquidity event
- Black Keys and Flying Private
- Jack Dorsey

The Ethics of UHNW Prospect Research

- “Where a Man’s wealth is, there is his Heart.”
- You have a stewardship responsibility to make your time with the prospect the most focused and relevant
- Organically discovering your client is a common misnomer
- Trust only develops over the course of time anyway
- Time is scarce and you get one shot – make your questions focused and have an idea based on who your prospects are, which means you need to know the narrative of their lives

The Market for Reaching UHNW is Broken and Inefficient

Power Struggle Churns Viacom, Even as a New Leader Is Named

By EMILY STEEL

With the ailing 92-year-old Sumner M. Redstone in his final act as a media titan, the two rivals jousting over the future of his \$40 billion entertainment empire repeatedly crisscrossed the country in the last several months to visit his mansion in a gated Beverly Hills enclave.

Shari Redstone, the ostracized daughter who had been restrict-

ed from visiting until mid-October, celebrated the holidays with her father, played games and discussed the media business. Mr. Redstone's grandchildren and two small great-grandchildren also visited. When not together, the father and daughter communicated via FaceTime, sometimes several times a day.

Philippe P. Dauman, the chief executive of Viacom who formed a close bond with Mr. Redstone decades ago when he was a

young corporate lawyer, also frequented the estate. The two discussed business, watched basketball and talked about films Mr. Redstone had recently screened.

The backdrop to those visits was an epic fight for money, power and love from Mr. Redstone, the controlling shareholder in Viacom and CBS. It was a story line that some Hollywood executives deemed too implausible for a movie or television series.

On Thursday, Mr. Dauman won

that initial battle for control when Viacom's board of directors named him executive chairman, succeeding Mr. Redstone. Yet Ms. Redstone has made her wishes clear. She was the sole Viacom director to vote against Mr. Dauman's nomination, and is opposed to having Mr. Dauman remain in charge.

And so, the real fight has only just begun.

"Shari is going to continue to

Continued on Page A3

OBITUARIES A18-19

Maurice White, Band Founder

The founder and leader of Earth, Wind and Fire, whose genre-defying sounds made it one of the most popular bands of the 1970s, died at 74.

PAGE A19



WEEKEND ARTS C1-30

Art in Abundance

Exhibitions by Peter Fischli and David Weiss, above, Laura Poitras and Anri Sala have opened in New York. PAGE C21

EDITORIAL, OP-ED A26-27

David Brooks

PAGE A27

Cartier



Diamond Collection

Shop for your Valentine at www.cartier.us - 1-800-cartier

Venezuela Orders Planeloads of Bank Notes

Government orders to print more banknotes to replace worn-out currency.

Caracas—Millions of banknotes, many of them worn and torn, are being replaced by new ones, the government announced. The new banknotes, which are being printed in large quantities, are expected to be in circulation by the end of the year. The government is also ordering the printing of new banknotes to replace worn-out currency.



Venezuelan banknotes are being replaced by new ones, the government announced.

In the Money

Stock market gains in the U.S. and abroad, with a focus on the technology sector.



The stock market in the U.S. and abroad has seen significant gains, particularly in the technology sector. Investors are optimistic about the future of the industry, and this is reflected in the rising prices of tech stocks.

Brazil Reports Zika Spread by Blood Donors

Health officials warn of potential transmission of the virus through blood transfusions.

Brazilian health officials have reported that the Zika virus can be spread through blood transfusions. This is a significant concern, as the virus has been linked to serious health complications. Health officials are urging caution and are working to ensure that blood donations are safe.



A person in Lima, Peru, is shown donating blood.

The two brothers, who are both blood donors, have been diagnosed with the Zika virus. This is a rare case, but it highlights the potential for transmission through blood transfusions.

Probe Weighs Possibility of Bomb on Somali Jet

Investigators are looking into the possibility of a bomb on board the aircraft.

A probe is underway to determine if a bomb was on board a Somali jet. The aircraft was found to have been hijacked, and investigators are looking for clues to identify the perpetrators. The possibility of a bomb on board is a serious concern, and the probe is being conducted with the utmost care.



A Somali jet is shown on the ground, with investigators looking at it.

The jet was found to have been hijacked, and investigators are looking for clues to identify the perpetrators. The possibility of a bomb on board is a serious concern, and the probe is being conducted with the utmost care.

The probe is being conducted by a team of experts, and they are working to identify the perpetrators as quickly as possible. The possibility of a bomb on board is a serious concern, and the probe is being conducted with the utmost care.

XOJET

10 YEARS of PUTTING PASSENGERS FIRST

We're just GETTING STARTED

10 years ago we founded XOJET on a simple premise: Private flyers deserve more control. A summit that private flyers agreed. Today we're giving passengers unprecedented flexibility with on-demand access to our certified and operated fleet along with over 1,500 partner network jets. We wouldn't have made it this far without our amazing employees and our incredibly loyal customers. Thank you for being part of the family. The best is yet to come.

10 YEARS
of PUTTING
PASSENGERS
FIRST

NEW

Control Bank Exports
Deeper Recession

The global economy is in a state of recession, and the impact is being felt in many countries. The control bank exports are being used to help stabilize the economy and to provide relief to the people.

The Biggest Mistakes Made when approaching UHNW Sales/Marketing

Scenario 1

Fatal Flaw: Disaggregated View of a Key Client across Global Retail Footprint

- **What you Know Today:**
 - Your Hong Kong office knows they spend in excess of \$100,000 per year at their retail store and \$100,000 in the Paris store
- **What you Don't Know:**
 - He/She is worth \$500M; \$100M liquid
 - Only likes bespoke items
- **Intelligence Deficit Impact:**
 - This individual shows up in the New York retail store
 - He expects to be treated appropriately but because the CRM systems are not share, the NYC staff treat this guest as any other prospective client
 - NYC Retail store hosts a large event for its top regional clients and this individual is not invited
- **How Intelligence Can Turn it Around:**
 - **Intelligence about this individual is shared across a global CRM platform for a 360 degree view of this individual scaled across the global retail sales organization**
 - **Equips and scales customer and prospect intelligence across the global retail sales organization**

“Faith without Works is Dead”

<p>Aspen Snowmass Sotheby's INTERNATIONAL REALTY</p> <p>ASPEN SNOWMASS SALT LAKE CITY CARBONDALE</p> <p>970.925.6060 AspenSnowmassSIR.com</p>		
<p>Red Mountain Ranch</p> <p>6 Bedrooms, 6 Full, 1 Half Baths 8,422 Sq Ft.</p> <p>\$19,500,000</p>		<p>Gary Felton 970.948</p>

Scenario 2

Fatal Flaw: Fatal Hope Marketing Event

- **What You Do Today:**

- Marketing decides to host an exclusive event for Scotch and wine tasting with dinner by a famous Chef
- Marketing calls the manager of the NYC retail store and says please invite your top clients and ask them to invite their “friends”

- **Intelligence Deficit Impact:**

- Your hope is that those key clients will bring not only their friends, but their financially qualified friends who might have a passion for your product
- You hope that during the course of the night you meet and have an opportunity to discover an engaging conversation and connect with that individual, whom you hope has the financial wherewithal to afford your product
- You hope to have a reason to follow-up

- **How Intelligence Can Turn it Around:**

- **Proactively map out the social graph of individuals around your top clients, be specific about who you want in the room, understand everything about them before they walk in the door and have all sales staff prepared for that engagement (we call this a Future Client Strategy mapping exercise)**

Scenario 3

Fatal Flaw: We are a Lifestyle Brand

- **What You Do Today:**
 - Start a “Lifestyle” magazine and content to engage your wealthiest and affluent consumers
 - You launch the magazine with content around what you “think” they want to consumer and read
- **Intelligence Deficit Impact:**
 - You don’t know their passions, hobbies and interests and so therefore bombard them all categories leaving it to them to curate and sort through
- **How Intelligence Can Turn it Around:**
 - **Engage this audience based on the content they want to consume mapped to their affinities, passions, hobbies and interests**

Scenario 4

Fatal Flaw: Advertising

- **What You Do Today:**
 - Spend \$150K on add in New Yorker
- **Intelligence Deficit Impact:**
 - Have no idea who they are engaging
- **How Intelligence Can Turn it Around:**
 - Segment and curate digital audience by screening publishers database

What is the Market and Where are the UHNW?

UHNW Population: Larger and Wealthier

211,275

UHNW Individuals

US\$ **29.7** trillion

UHNW Wealth

Almost One Million People Have Access to UHNW Resources



845,000

**Principal, plus spouse
and 2 adult children**

The “Typical” UHNW Individual

Average Net Worth

US\$141 million

Average Age

59 years

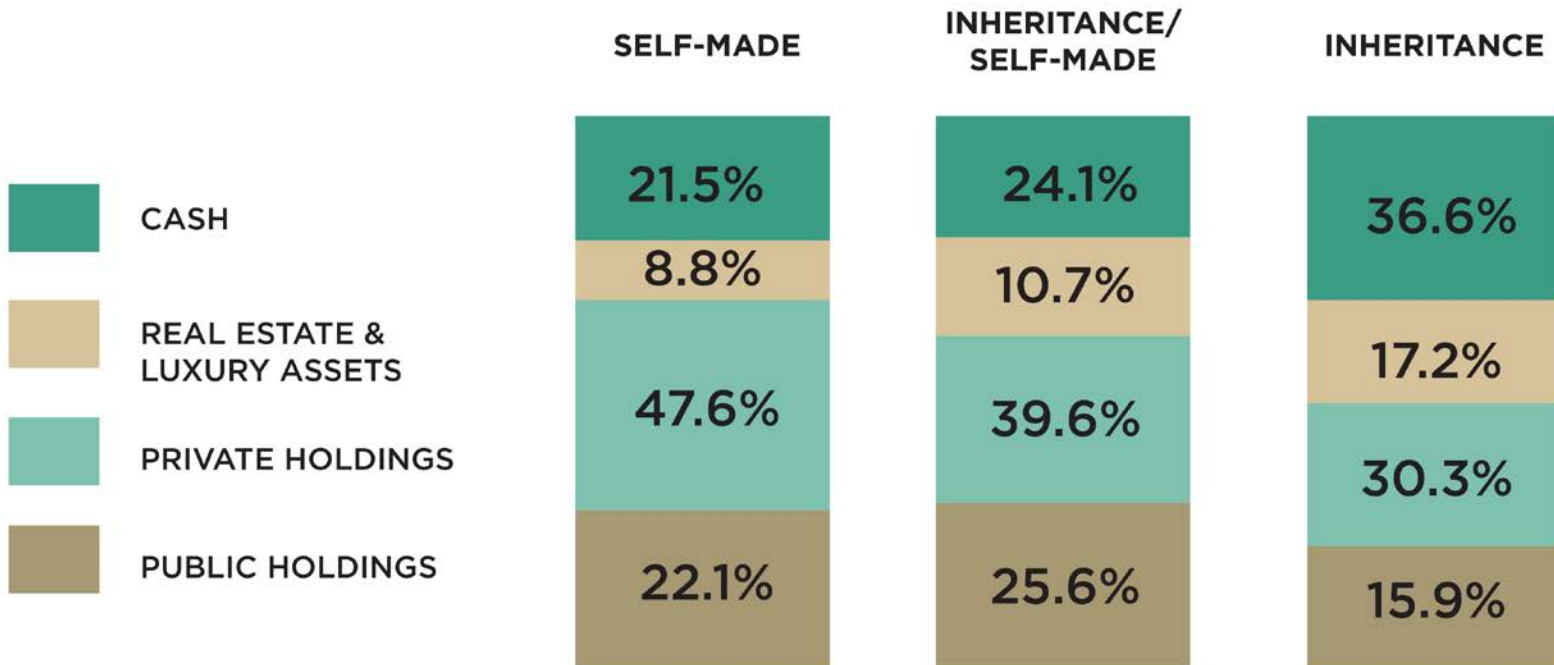
Average Liquidity

US\$35 million

Average Number of Children

2 children

Private Wealth Dominates



Most Concentrated Consumer Segment

0.004%

of the world's
population

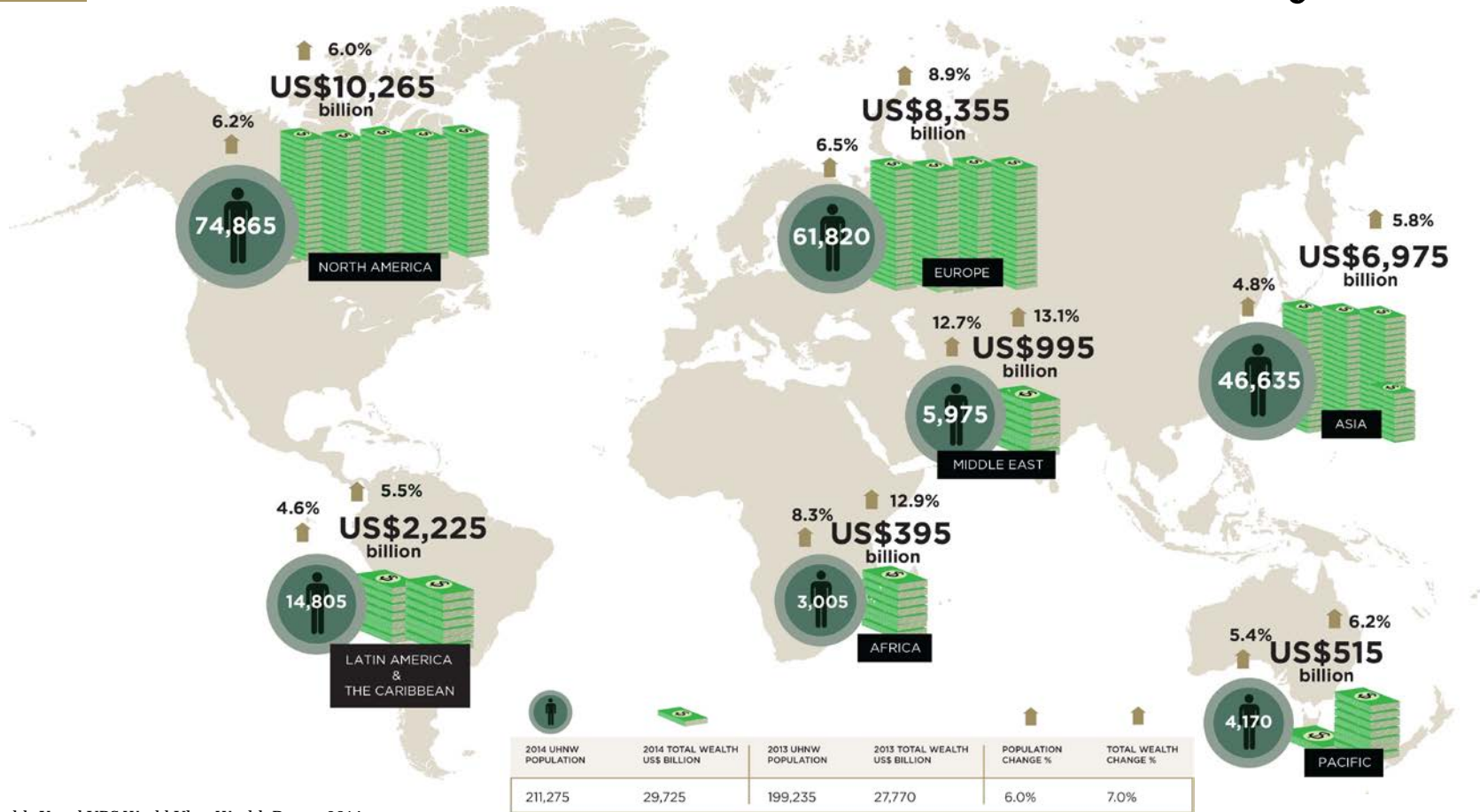
13%

of the world's
wealth

211,275 individuals

	UHNW Market	UHNW Share
Wealth Management	US\$7,395 billion	37%
Luxury	US\$234 billion	19%
Non- Corporate Philanthropy	US\$90 billion	18%

Where Are The World's Ultra Wealthy?



USA Keeps its Pole Position

	COUNTRY	UHNW POPULATION	UHNW WEALTH US\$ billion
1	UNITED STATES	69,560	9,630
2	GERMANY	19,095	2,580
3	JAPAN	14,720	2,430
4	UNITED KINGDOM	11,510	1,445
5	CHINA	11,070	1,565

Top 10 World Cities

	CITY	UHNW POPULATION	2012-2013 CHANGE %
1	NEW YORK, UNITED STATES	8,655	7.9%
2	LONDON, UNITED KINGDOM	6,815	7.2%
3	TOKYO, JAPAN	6,185	2.8%
4	SAN FRANCISCO, UNITED STATES	5,460	12.8%
5	LOS ANGELES, UNITED STATES	5,135	3.8%
6	OSAKA, JAPAN	3,405	3.2%
7	PARIS, FRANCE	3,345	4.7%
8	HONG KONG	3,335	4.9%
9	CHICAGO, UNITED STATES	2,885	8.3%
10	MEXICO CITY, MEXICO	2,780	3.2%

New Generations of Billionaires Emerge

	2014		2013		2013-2014	
	NUMBER OF BILLIONAIRES	TOTAL WEALTH US\$ billion	NUMBER OF BILLIONAIRES	TOTAL WEALTH US\$ billion	POPULATION CHANGE %	WEALTH CHANGE %
TOTAL	2,325	7,291	2,170	6,516	7.2%	11.9%
SELF-MADE	1,273	4,051	1,298	3,825	-1.9%	5.9%
INHERITANCE/ SELF-MADE	599	1,750	434	1,370	38.0%	27.7%
INHERITANCE	453	1,490	438	1,321	3.4%	12.8%

Billionaires' Network of Wealth

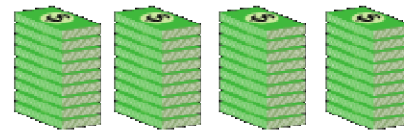


Average Number of UHNW Known Associates



Average Number of
Billionaire Known Associates

US\$ 16 Billion



Average Social Graph

Demi-Billionaires Grow Fastest

WORLD UHNW	2014		2013-2014	
NET WORTH	UHNW POPULATION	UHNW WEALTH US\$ Billion	POPULATION CHANGE	WEALTH CHANGE
\$1 billion +	2,325	7,291	7.1%	11.9%
\$750 to \$999 million	1,295	1,075	19.9%	15.7%
\$500 to \$749 million	3,590	2,464	14.9%	12.6%
\$250 to \$499 million	9,335	3,530	7.4%	3.2%
\$200 to \$249 million	14,580	3,170	6.3%	4.9%
\$100 to \$199 million	25,400	3,660	6.6%	5.5%
\$50 to \$99 million	63,120	4,775	3.9%	1.2%
\$30 to \$49 million	91,630	3,760	6.7%	7.3%
TOTAL	211,275	29,725	6.0%	7.0%

Wealth-X Five Year Forecast

	AVERAGE ANNUAL POPULATION GROWTH %	AVERAGE ANNUAL WEALTH GROWTH %
WORLD	4.4%	5.3%
NORTH AMERICA	4.2%	5.2%
EUROPE	3.3%	4.5%
ASIA	5.7%	6.7%
LATIN AMERICA & THE CARIBBEAN	4.3%	4.9%
MIDDLE EAST	6.0%	5.1%
PACIFIC	3.9%	3.3%
AFRICA	7.0%	5.5%

World UHNW By Tier

	2014		2013		2013-2014	
	UHNW POPULATION	UHNW WEALTH US\$ billion	UHNW POPULATION	UHNW WEALTH US\$ billion	POPULATION CHANGE %	WEALTH CHANGE %
TOTAL	211,275	29,725	199,235	27,770	6.0%	7.0%
US\$1 billion +	2,325	7,291	2,170	6,516	7.1%	11.9%
US\$750 million - US\$999 million	1,295	1,075	1,080	929	19.9%	15.7%
US\$500 million - US\$749 million	3,590	2,464	3,125	2,189	14.9%	12.6%
US\$250 million - US\$499 million	9,335	3,530	8,695	3,420	7.4%	3.2%
US\$200 million - US\$249 million	14,580	3,170	13,720	3,022	6.3%	4.9%
US\$100 million - US\$199 million	25,400	3,660	23,835	3,469	6.6%	5.5%
US\$50 million - US\$99 million	63,120	4,775	60,760	4,720	3.9%	1.2%
US\$30 million - US\$49 million	91,630	3,760	85,850	3,505	6.7%	7.3%

UHNW Asia Market Data

Asia

China

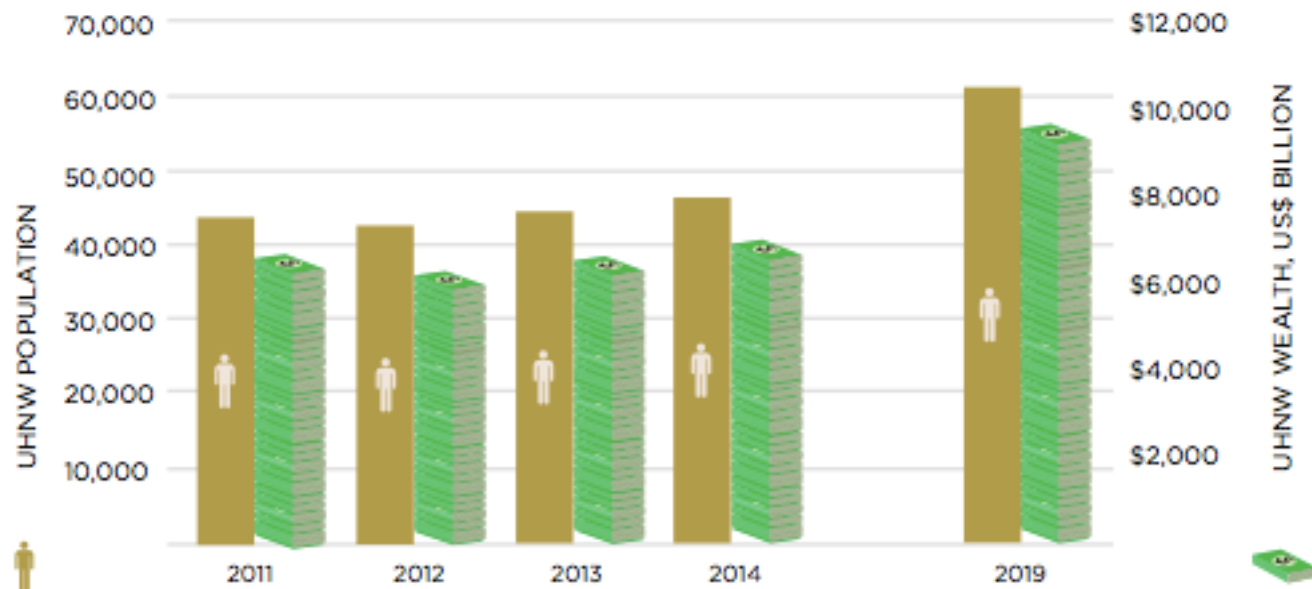
Pacific

Australia

Asia

Asia UHNW Landscape

ASIA 2011-2019



	2014		2013		2013-2014	
	UHNW POPULATION	UHNW WEALTH US\$ billion	UHNW POPULATION	UHNW WEALTH US\$ billion	POPULATION CHANGE %	WEALTH CHANGE %
WORLD	211,275	29,725	199,235	27,770	6.0%	7.0%
ASIA	46,635	6,975	44,505	6,590	4.8%	5.8%



Asia UHNW Map

Asia UHNW Market

	2014		2013		2013-2014	
	UHNW POPULATION	UHNW WEALTH US\$ billion	UHNW POPULATION	UHNW WEALTH US\$ billion	POPULATION CHANGE %	WEALTH CHANGE %
ASIA	46,635	6,975	44,505	6,590	4.8%	5.8%
JAPAN	14,720	2,430	14,270	2,335	3.2%	4.1%
CHINA	11,070	1,565	10,675	1,515	3.7%	3.3%
INDIA	8,595	1,013	7,850	935	9.5%	8.3%
HONG KONG	3,335	595	3,180	530	4.9%	12.3%
SOUTH KOREA	1,470	280	1,390	265	5.8%	5.7%
SINGAPORE	1,395	180	1,355	160	3.0%	12.5%
TAIWAN	1,315	225	1,245	210	5.6%	7.1%
INDONESIA	875	130	865	130	1.2%	0.0%
MALAYSIA	875	110	840	105	4.2%	4.8%
THAILAND	735	135	720	110	2.1%	22.7%
PHILIPPINES	690	100	660	95	4.5%	5.3%
PAKISTAN	465	55	415	50	12.0%	10.0%
VIETNAM	210	20	195	20	7.7%	0.0%
KAZAKHSTAN	140	22	130	20	7.7%	10.0%
BANGLADESH	95	16	90	15	5.6%	6.7%
UZBEKISTAN	90	14	85	13	5.9%	7.7%
SRI LANKA	80	10	75	10	6.7%	0.0%
AZERBAIJAN	70	10	65	10	7.7%	0.0%
TAJIKISTAN	45	6	45	6	0.0%	0.0%
MONGOLIA	35	7	35	6	0.0%	16.7%
REST OF ASIA	330	52	320	50	3.1%	4.0%

China

China UHNW Market Segmentation

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US\$750 million - US\$999 million	190	160	165	137	15.2%	16.8%
US\$500 million - US\$749 million	605	420	530	385	14.2%	9.1%
US\$250 million - US\$499 million	2,455	965	2,310	965	6.3%	0.0%
US\$200 million - US\$249 million	5,345	1,150	4,932	1,098	8.4%	4.7%
US\$100 million - US\$199 million	7,665	1,140	7,320	1,070	4.7%	6.5%
US\$50 million - US\$99 million	13,650	1,060	13,370	1,135	2.1%	-6.6%
US\$30 million - US\$49 million	16,165	670	15,370	612	5.2%	9.5%

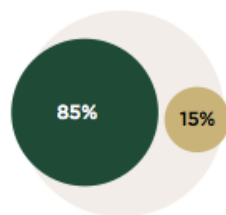
China UHNW Market



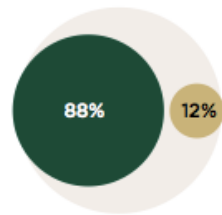
CHINA

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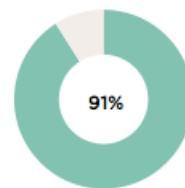
China UHNW Market



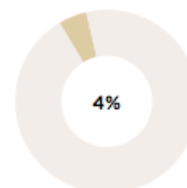
POPULATION



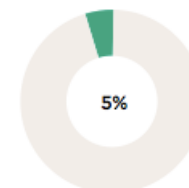
NET WORTH



SELF-MADE



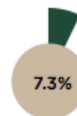
INHERITANCE/
SELF-MADE



INHERITANCE

TOTAL WEALTH US\$ 21,310 BILLION

UHNW WEALTH US\$ 1,565 BILLION



7.3%

Australia

Pacific UHNW Market

PACIFIC 2011-2019



Pacific UHNW Market

	2014		2013		2013-2014	
	UHNW POPULATION	UHNW WEALTH US\$ billion	UHNW POPULATION	UHNW WEALTH US\$ billion	POPULATION CHANGE %	WEALTH CHANGE %
WORLD	211,275	29,725	199,235	27,770	6.0%	7.0%
PACIFIC	4,170	515	3,955	485	5.4%	6.2%
AUSTRALIA	3,580	440	3,405	415	5.1%	6.0%
NEW ZEALAND	550	70	510	65	7.8%	7.7%
REST OF PACIFIC	40	5	40	5	0.0%	0.0%

Australia UHNW Market

	2014		2013		2013-2014	
	UHNW POPULATION	UHNW WEALTH US\$ billion	UHNW POPULATION	UHNW WEALTH US\$ billion	POPULATION CHANGE %	WEALTH CHANGE %
WORLD	211,275	29,725	199,235	27,770	6.0%	7.0%
PACIFIC	4,170	515	3,955	485	5.4%	6.2%
AUSTRALIA	3,580	440	3,405	415	5.1%	6.0%
NEW ZEALAND	550	70	510	65	7.8%	7.7%
REST OF PACIFIC	40	5	40	5	0.0%	0.0%



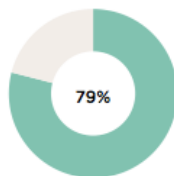
Australia UHNW Population

	2014		2013		2013-2014	
	UHNW POPULATION	UHNW WEALTH US\$ billion	UHNW POPULATION	UHNW WEALTH US\$ billion	POPULATION CHANGE %	WEALTH CHANGE %
TOTAL	4,170	515	3,955	485	5.4%	6.2%
US\$1 billion +	34	97	34	99	0.0%	-2.0%
US\$750 million - US\$999 million	40	33	30	25	33.3%	32.0%
US\$500 million - US\$749 million	70	45	60	40	16.7%	12.5%
US\$250 million - US\$499 million	190	55	170	51	11.8%	7.8%
US\$200 million - US\$249 million	285	67	260	60	9.6%	11.7%
US\$100 million - US\$199 million	460	60	430	57	7.0%	5.3%
US\$50 million - US\$99 million	1,120	78	1,075	75	4.2%	4.0%
US\$30 million - US\$49 million	1,971	80	1,896	78	4.0%	2.6%

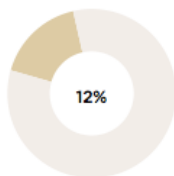
Australia UHNW population



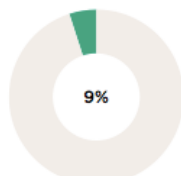
AUSTRALIA



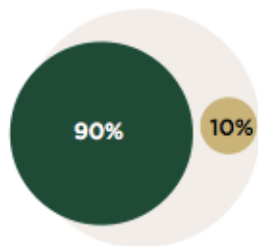
SELF-MADE



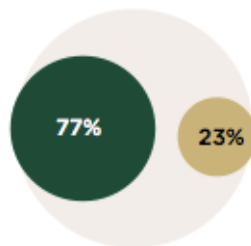
INHERITANCE/
SELF-MADE



INHERITANCE



POPULATION

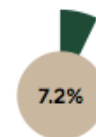


NET WORTH

	2014		2013		2013-2014	
	UHNW POPULATION	UHNW WEALTH US\$ billion	UHNW POPULATION	UHNW WEALTH US\$ billion	POPULATION CHANGE %	WEALTH CHANGE %
PACIFIC	4,170	515	3,955	485	5.4%	6.2%
AUSTRALIA	3,580	440	3,405	415	5.1%	6.0%

TOTAL WEALTH US\$ 6,080 BILLION

UHNW WEALTH US\$ 440 BILLION



Looking Ahead to 2019

UHNW POPULATION AND WEALTH TRENDS



**24% more
UHNW
Individuals**

**29% more
UHNW
Wealth**

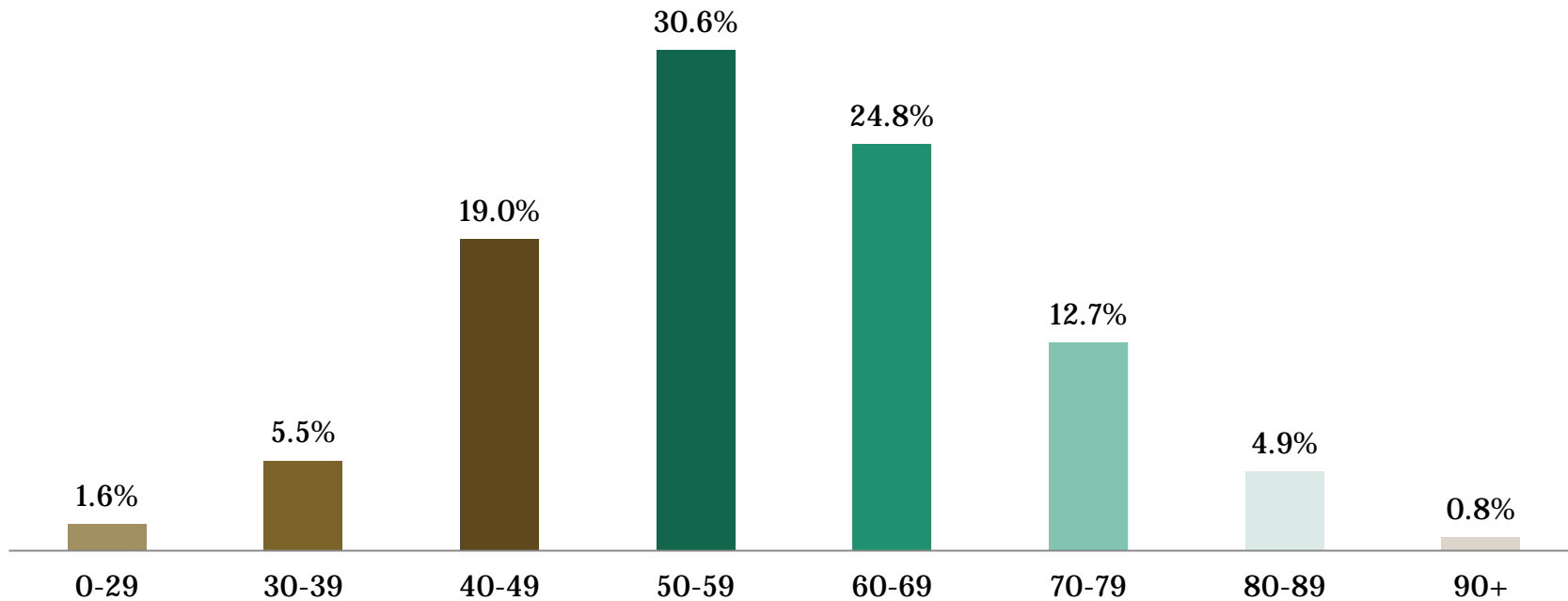


Five Year Forecast

REGION	AVERAGE ANNUAL POPULATION CHANGE %	AVERAGE ANNUAL WEALTH CHANGE %
North America	4.2%	5.2%
Europe	3.3%	4.5%
Asia	5.7%	6.7%
Latin America	4.3%	4.9%
Middle East	6.0%	5.1%
Oceania	3.9%	3.3%
Africa	7.0%	5.5%
World	4.4%	5.3%

Significant Trend

Almost 75% of the UHNW Population is over 50





Findings from Wealth-X and NFP Family Wealth Transfers Report

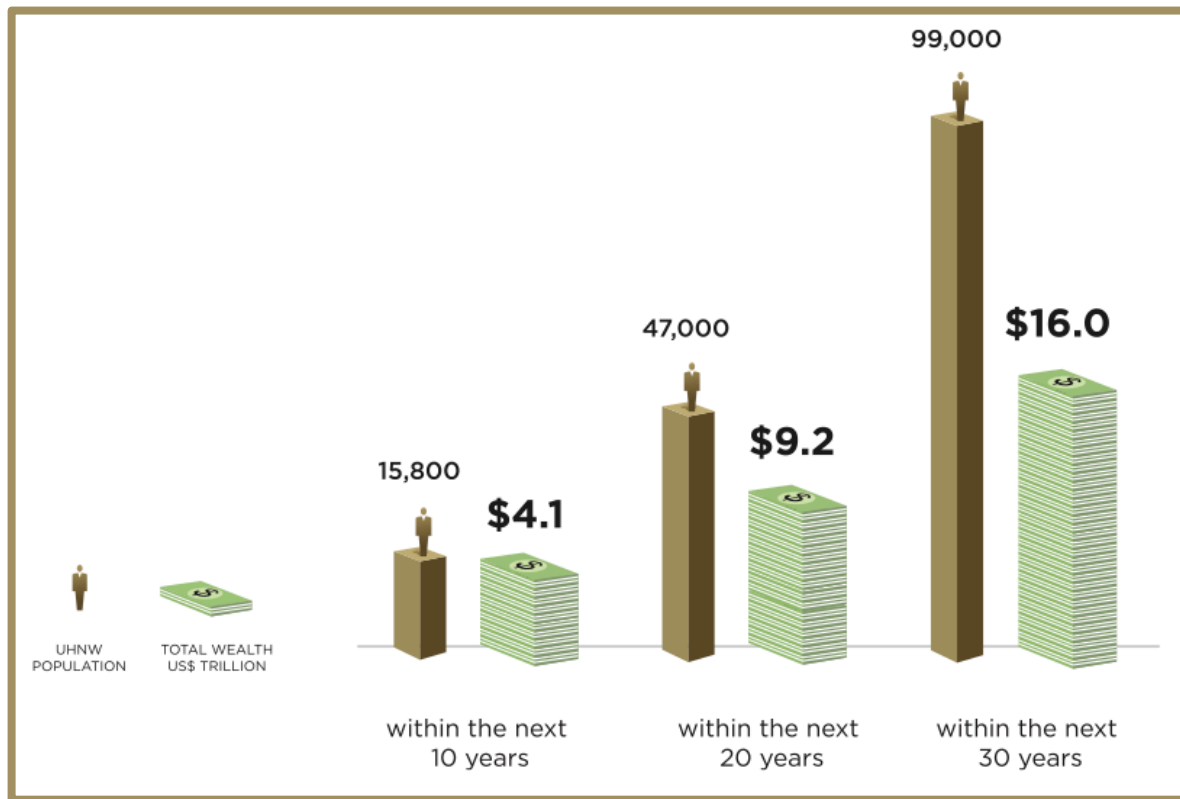


FAMILY WEALTH TRANSFERS REPORT



**US\$16 trillion to be transferred in
the next three decades**

Inherited Wealth to Grow



New Generations of UHNW individuals

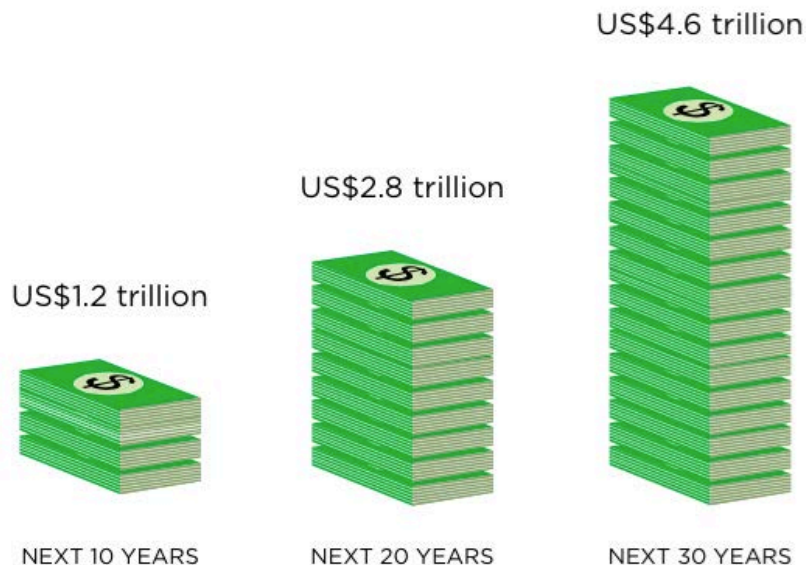
Many used to luxury lifestyle

New clients, different expectations

Liquidity to Increase

- US\$6 trillion of wealth to be transferred in privately held wealth
- Some heirs likely to sell their stakes
- Furthermore, US\$4.6 trillion in liquid assets will be transferred

Liquid Assets to be Transferred, by Decade



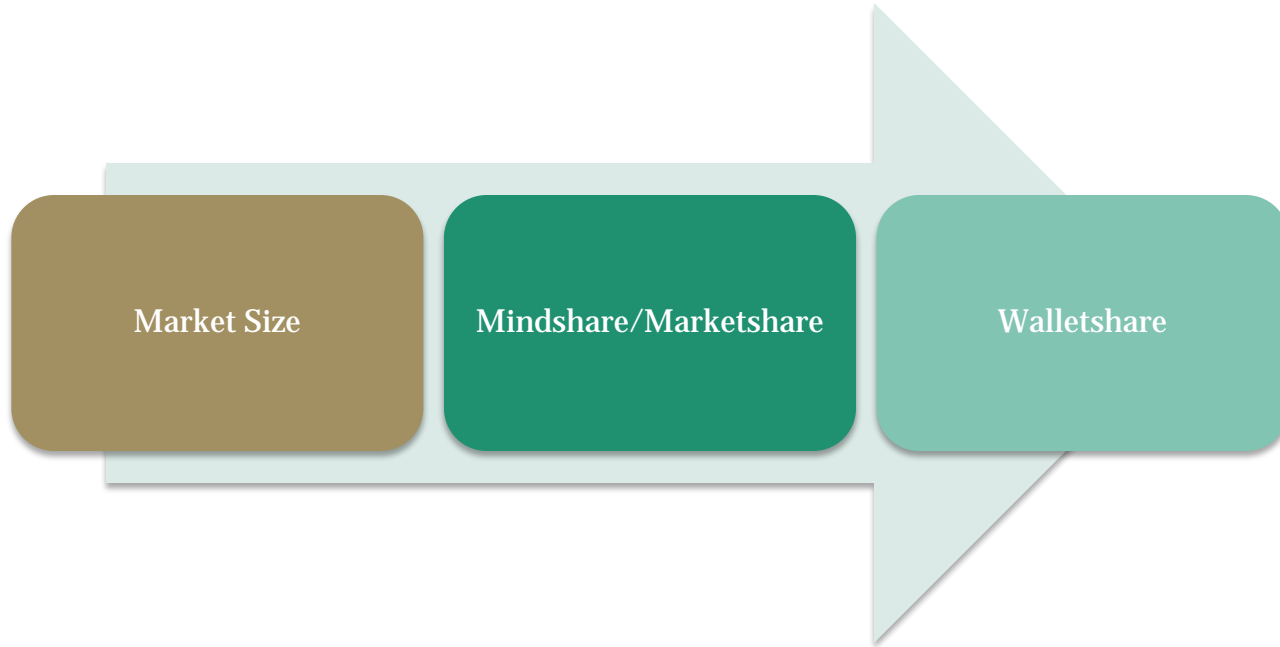


US\$2.9 trillion

UHNW WEALTH HELD IN OWNER-OCCUPIED RESIDENTIAL REAL ESTATE

Engaging the Ultra Affluent

UHNW Consumer Journey



Will Robots Wear Cartier?

Will Inequality Spark A Class War?

19 June 2015



Wealth-X President David Friedman appeared on CNN to discuss Richemont Chairman Johann Rupert's recent comments at the FT Luxury Conference on wealth and inequality.



HOME U.S. ▾ NEWS MARKETS INVESTING TECH S

Rupert said Richemont—which owns Net-a-Porter, Alfred Dunhill and jeweler Van Cleef & Arpels, along with luxury watch brands Cartier, Piaget, Vacheron Constantin and IWC—will continue to focus on desirable products with brand equity.



Chris Ratcliffe | Bloomberg | Getty Images

Richemont Chairman Johann Rupert speaks with delegates during the Financial Times Business of Luxury Summit in Monaco, June 8, 2015.

Key Luxury Landscape Trends & Lessons

- **The Search for the Soul of Luxury**
 - Democratization of luxury; has it overextended
 - Rag & Bone with Target
 - Vera Wang with Kohl's
 - Acquisition of HW by Swatch
 - De-democratization of luxury and retrenchment towards UHNW
 - Levi's Bespoke Store in Meatpacking
 - Tiffany, Abbot Downing, Ascent Private Capital
 - Sony
 - Is Luxury by nature exclusive?
 - Debate between exclusive vs. inclusive

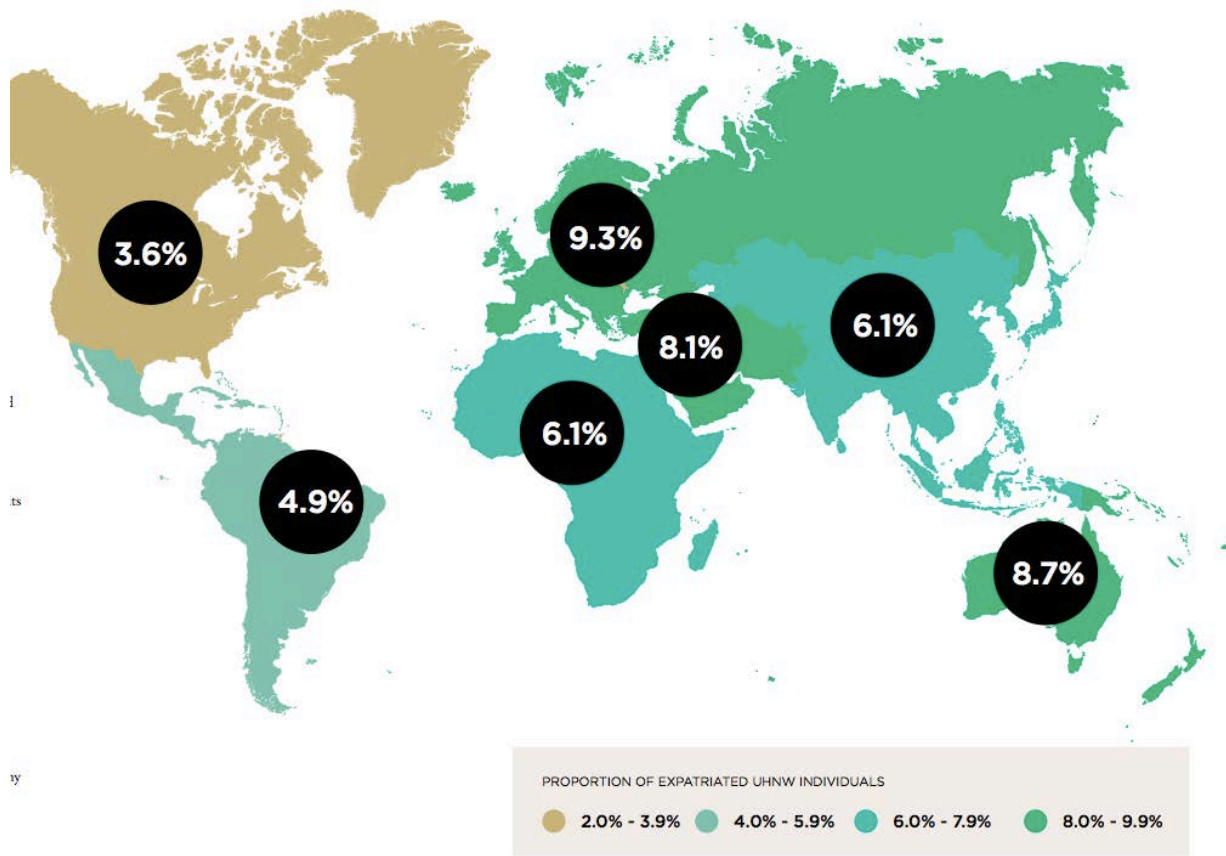
Key Trends & Lessons from Luxury

- **UHNW consumers are looking for strong brand voices and narratives yet for bespoke experiences**
 - Successful engagement of the UHNW market by luxury brands will have to navigate this tension successfully
- **Data driven marketing – Shift from “What did they spend” to “What could they spend” from Segmentation by spend to wealth**
 - From marketing based on spend to marketing based on net worth; from how much did they spend to how much can they spend
 - When sitting down with your agencies, discussion from average spend to annual household income
- **The US is the New Emerging market for luxury**
- **Risk & Reward: The convergence of UHNW and KYC/AML**

Key Trends

- **From “brick’n’mortar” to “click’n’mortar” back to “brick’n’mortar”**
 - 90% of Asia’s luxury purchases will be outside of China
 - For highest price items, its about the experience
 - Tiffany’s Salon

Global UHNW Pockets



Risk Graph - Reputational Risk

- The emergence of hyper polarized wealth in emerging economies is closely linked with traditional risk and compliance issues
- AML/KYC
 - Casinos
 - Auction Houses
- Enlightenment Publishing
 - Cyprus
 - Arkady R. Rotenberg, a judo sparring partner from Mr. Putin's St. Petersburg youth
 - Microsoft



Towers of Secrecy

Q SEARCH

The New York Times

Times Premier



TIMES INSIDER



TIMESTALKS



TBOOKS



PREM

Times Insider

STORY BEHIND THE STORY

Inside the Towers of Secrecy

By LOUISE STORY FEBRUARY 19, 2015 5:02 PM



Condo ownership in the Time Warner Center reflects the rising use of shell companies to buy high-end real estate. Todd Heisler/The New York Times

Chinese Luxury Consumer

INTERNATIONAL BUSINESS

China's Big Spenders Pull Back, as Stock Market

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By HIROKO TABUCHI and AMIE TSANG AUG. 26, 2015



Waiting for customers at a Rolex store in the Causeway Bay section of Hong Kong. Spending on luxury goods in China contracted 1 percent last year, to about \$18 billion. Xaume Olleros/Bloomberg News, via Getty Images

- Chinese anti-corruption purge has facilitated major pull back
- Macao revenues have shrunk for the first time
- Conspicuous and over luxury is receding
- “This is going to hit hard,” said David Friedman, the president of Wealth-X, a luxury intelligence firm. Mr. Friedman, who is based in New York, added, “It’s the straw that breaks the camel’s back for luxury brands that looked at the Chinese consumer as a driver of their revenue growth.”
- “Is the Chinese consumer still incredibly important to luxury brands? The answer is absolutely yes. But is the Chinese consumer over the next several years going to be the same economic juggernaut of consumption for these brands? The answer is no.”



Convergence of UHNW, Luxury, Residential Property & Visas

U.S. VISA-FOR-CASH PLAN FUNDS LUXURY TOWERS

Program to spur jobs in poor areas supports projects in well-off neighborhood

By ELIOT BROWN

NEW YORK—The cluster of luxury apartment buildings and office towers rising in a development west of midtown called Hudson Yards seems a world apart from the low-income housing projects of upper Manhattan.

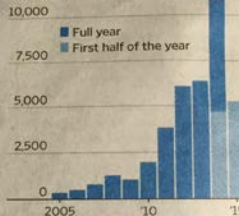
But for purposes of an immigration program that helps finance Hudson Yards, it and Harlem's Manhattanville public-housing towers are in the same district: a stringy one connected by three Census tracts that run along the Hudson River.

Merging, on paper, the affluent midtown neighborhood and the struggling one uptown placed Hudson Yards in a community with an overall high unemployment rate, positioning developer Related Cos. to gain low-cost financing from foreigners seeking green cards.

The program through which that happens, known as EB-5, enables foreign nationals to ob-

Wanting In

A program that lets foreigners gain residence by investing in the U.S. has seen applications jump.



Note: For fiscal years ending Sept. 30
Source: Department of Homeland Security
THE WALL STREET JOURNAL.

tain U.S. permanent-resident status by putting up money for new business ventures that create American jobs. It gives investors in high-unemployment and rural areas a special status to encourage investment. But as the program's popularity has soared in recent years, the bulk of immigrant investment is going to projects that are located, like \$20 billion Hudson Yards, in prosperous urban neighborhoods.

On Sept. 30, a key piece of the EB-5 program is expiring. As Congress prepares to take up reauthorization, some lawmakers are questioning the way the program is being used and a fight is brewing.

"The incentives Congress created to direct EB-5 investment to rural areas and urban areas plagued by high unemployment have been abused," said Sen. Patrick Leahy (D., Vt.), co-sponsor of a reauthorization bill that would prevent projects in affluent urban neighborhoods.

Please see EB-5 page

Best Practices and Strategy

Sale, Market & Advertise Different : Bespoke Marketing

From Targeting Segments to Crafting Sales/Marketing approaches that engage an individual person based on who they are (their life story, passions, hobbies, interests) and who they spend time with

- What if you could directly qualify an individual based on their fit for your products and their proximity to your company's greatest ambassadors?
- And then tailor fit an approach that engages them around their passions and interest?
- Measure your market share and wallet share of an individual's overall spending.

Let's Review – 3 Cornerstones of an UHNW Engagement Strategy

1. Where are my future key and highest revenue/margin clients?

- Hidden within your existing database – Wealth Screen and Client Analytics
- Connected to your existing clients – Future Client Strategy Mapping exercise

2. Who are they?


Wealth-X Bespoke Intelligence Dossier

3. How do I engage them?

Bespoke Marketing Strategies





But Who Are They, Really?


From Shotgun to Rifle


 WEALTH-X
CONNECTING YOU TO WEALTH

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Welcome back, [David Friedman](#)
[Request New Dossier](#)
[Feedback](#)
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[UHNW](#)
 Syuan Lam WANG
 






Primary Position	Shareholder	Birthday	27 Jan 1988
Primary Company	Golden Eagle Retail Group	Residences	Beverly Hills, California, United States
Estimated Net Worth	At least \$330 million		Jiangsu, China
Estimated Liquid Assets	At least \$17 million	Hometown	California, United States
Wealth Trend	Majority of fortune fluctuates with the share prices of Golden Eagle Retail Group and PDC Stores (Group); remainder fluctuates with the broad equity and bond markets. Wealth estimate does not include the fortune of other Wang family members.		
Source	Inheritance	Religion	Unknown
Nickname	Dorothy Wang, Xuanlin Wang	Ethnicity	Chinese
Age	25	Marital Status	Single

Biography

Father, Hung "Roger" Wang, emigrated from China to the U.S.A. in 1971. He later founded Transpacific Management, a real estate investment and management company in Los Angeles, California, in 1978. In 1992, he returned to China and founded the Golden Eagle Group; the company currently specializes in real estate development and retail department stores. In 1995, the company established Golden Eagle Retail Group, a luxury fashion retail subsidiary which operates at least 27 department stores in China and went public on the Hong Kong Stock Exchange in 2006. The Wang family currently holds 68.36% shares in the company through GEICO Holdings, a holding company which is wholly owned by The 2004 RVJD Family Trust (RVJD), the family trust which benefits Roger Wang, his wife, and two daughters. In late October 2012, GEICO Holdings increased its shares in PCD Stores (Group), a Chinese luxury department store chain, from 5.12% to 7.05%, a total purchase of 53.58 million shares for more than \$4.8 million. Syuan Lam "Dorothy" Wang is the youngest daughter of Roger Wang and a major shareholder of the Golden Eagle Retail Group through RVJD. She does not appear to have a job or any responsibilities with the company, and appears to spend most of her time traveling and shopping; often refers to herself as being "funemployed."

Who is She?

Interesting Facts

Wang appears to travel with luggage from upmarket purveyor Rimowa.

Wang claims to have attended a "business meeting" in London, England on November 30, 2012. Further details are unclear.

In December 2011, Gary Lovema, CEO of Caesars Entertainment, Steven Tight, President of Caesars Entertainment, and Alex Mirza and Geoffery Stewart, Executives of Caesars Entertainment, visited the Golden Eagle Group and signed a Strategic Partnership Agreement with the group.

The Wang family recently went to the Golden Eagle Disabled Children Education Center and Children's Welfare Office in Nanjing, China to celebrate Christmas with them. Wang was reportedly delighted when she discovered that two orphans had been adopted by foreign families and were well cared for.

In May 2009, Golden Eagle Group opened the Shanghai Golden Eagle International Shopping Center which has several luxury department stores including Gucci and Bottega Veneta.

In December 2012, an acquaintance appears to have tried to pass off a photo of Wang's Hermes Birkin handbag as her own. Wang's friends pressured the acquaintance to delete the photo from social media websites.

Wang appears have an interest in Christian Louboutin shoes, a luxury French shoe and bag designer. She formerly used a photo of the brand's signature black high heel with red-lacquered sole as her Facebook profile photo. She also posted a picture on her Instagram account of a Christmas tree in a Christian Louboutin store made of white shoes with red-lacquered soles.

Wang appears to drive a Porsche automobile.

After a 76-round tender offer in July 2010, Golden Eagle Retail Group acquired a 100% stake in Anhui Ruijing Business Company, a subsidiary of Anhui Gujing Company, for \$39.36 million. Anhui Ruijing Business Company owns two luxury department stores in Anhui, China.

Wang appears to spend the majority of her time shopping, partying, and traveling with friends and her mother. Her social and lifestyle activities are regularly shared on her Twitter account. Recent tweets include: "Long day of retail therapy w/ @ezrajwilliam @AngelinaCindy@wintosutowo :)*"; "A day of retail therapy with my pet snake #celine #nopetsjustpurses"; "Great shopping day and late lunch at carette! Still can't believe@sarahalhassan_ and I both scored a pair of isabel python shoes"; "had a nice, lonngggg day w/ mummy at the shops! #girltime"; "Of course the guest bringing my shoes' flight is delayed!!!!!! Heading to cannes for a shopping mission #wishmeluck."

Wang enjoys luxury clothing brands including Hermes, Balenciaga, Isabel Marant Bazil, Bebe, Birkin, Christian Louboutin, and Chanel. She also appears to own a Frank Muller watch and a purse made from white water snake leather, which she named "Celine."

What are Her Passions Investment?

- Wang appears to travel with luggage from upmarket purveyor Rimowa.
- Wang appears to drive a Porsche automobile.
- Wang enjoys luxury clothing brands including Hermes, Balenciaga, Isabel Marant Bazil, Bebe, Birkin, Christian Louboutin, and Chanel. She also appears to own a Frank Muller watch and a Celine purse made from white water snake leather.

What is on Her Mind?

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What are Her Passions & Hobbies?

Interests, Passion, Hobbies

Hobby Name	Description
Cycling	Appears to attend spinning classes.
Philanthropy	The Wang family are active philanthropists and primarily support education, arts and culture, healthcare, natural disaster relief, and social causes.
Social Networking	Active user of Facebook, Twitter, and Instagram.
Languages	Reportedly speaks Mandarin Chinese, English, and Spanish.
Luxury Lifestyle	Enjoys and purchases items from luxury clothing brands including Hermes, Balenciaga, Isabel Marant Bazil, Bebe, Birkin, Christian Louboutin, and Chanel.
Partying	Appears to enjoy clubbing and bars.
Food	Appears to enjoy cooking and dining out.
Fashion	Appears to have attended several Chanel promotional events, including a party marking the publication of "Chanel: Her Life", a biography of Coco Chanel, in 2011, and a fashion show displaying Chanel's 2012/2013 line in 2012.
Travelling	Appears to enjoy travelling; recently traveled to Paris and London and has also been to Las Vegas.

Who Does She know?

Known Associates

Name	Company	Relationships	Remarks
Kexu WANG	Ports International Enterprises	Business	President of Beijing Chun Tian Real Estate; Vice President and Assistant to the Director of PCD Stores (Group), a subsidiary of Ports International Enterprises. Wang is shareholder of PCD Stores (Group) via GEICO Holdings, a holding company established by father, Hung Wang.
YI ZHU	Golden Eagle Retail Group	Business	Vice President of Golden Eagle Retail Group, of which Wang is a shareholder and daughter of Founder, Hung Wang.
Ezra J. WILLIAM	-	Friendship	Self-described "fashion enthusiast" appears to be Wang's friend. Believed to live in Los Angeles, California and New York, New York. William's occupation, if any, and family background are unclear.
Kai Tai CHAN UHNW	Ports International Enterprises	Business	CEO of Ports International Enterprises; Chairman of PCD Stores (Group), a subsidiary Ports International Enterprises. Wang is shareholder of PCD Stores (Group) via GEICO Holdings, a holding company established by father, Hung Wang.
Gang DONG	Ports International Enterprises	Business	Financial Controller of PCD Stores (Group), a subsidiary of Ports International Enterprises; Wang is shareholder of PCD Stores (Group) via GEICO Holdings, a holding company established by father, Hung Wang.
Xi Qing TANG	Golden Eagle Retail Group	Business	Vice President of Golden Eagle Retail Group, of which Wang is a shareholder and daughter of Founder, Roger Wang.
Chi Huan LIU UHNW	East West Bank	Business	Chairman of East West Bank (China) is an Independent Director of Golden Eagle Retail Group, of which Wang is a shareholder and daughter of Founder, Roger Wang.
Nicola CAGLIATA	Chanel	Business	Director of Watches and Fine Jewelry of Chanel; attended the "Chanel: Her Life" party with Wang.

Yiqian Liu



Primary Position	Chairman	Age	51
Primary Company	Sunline Group	Birthday	28 Nov 1963
Estimated Net Worth	At least \$900 million	Residences	Huangpu, Shanghai, China
Estimated Liquid Assets	At least \$16 million		Pudong, Shanghai, China

Notable Art Collector
Owns over US\$460 million in art

Find Out Who He Knows

Name	Company	Relationships	Remarks
<u>Yunhua XIAO</u>	Hubel Biocause Pharmaceutical	Business	Chairman and General Manager of Hubel Biocause Pharmaceutical, a company that manufacture pharmaceuticals and chemical products, where Liu is the Former Chairman.
<u>Zhigang CHENG</u>	Hubel Biocause Pharmaceutical	Business	Chief Engineer of Hubel Biocause Pharmaceutical, a company that manufacture pharmaceuticals and chemical products, where Liu is the Former Chairman.
<u>Guoqiang DONG</u>	Beijing Council International Auction	Friendship	Founder and Chairman of Beijing Council International Auction; is a friend of Liu. Dong and Liu jointly established the auction company in 2005; Liu currently appears to be the financial backer of the company.
<u>Dianling HU</u>	Hubel Biocause Pharmaceutical	Business	Director in Hubel Biocause Pharmaceutical, a company that manufacture pharmaceuticals and chemical products, where Liu is the Former Chairman.
<u>Xuamin DENG</u>	Sunline Group	Business - Colleague	Serves as CFO of Sunline Group, where Liu is the Chairman. Deng is also a Former Director in Hubel Biocause Pharmaceutical, a company that manufacture pharmaceuticals and chemical products, where Liu served as the Chairman.
<u>Wenqing SHI</u>	Hubel Biocause Pharmaceutical	Business	Director and Executive General Manager of Hubel Biocause Pharmaceutical, a company that manufacture pharmaceuticals and chemical products, where Liu is the Former Chairman.

“LinkedOut”

The Wealth Graph and Referrals

Who do your top clients know that should be your next key clients?

Referrals:

#1 Source of New Client Acquisition

- The study – revealed at the Google Beach Pavilion in Cannes – notes that consumers now make purchasing decisions in the same way they consume content – with the purpose of choosing brands that engage their passion and interests.
- “With consumer behaviour changing so quickly, understanding that the path to purchase is actually a path to purpose has meaningful implications for brand advertising at all stages along the consumer journey,” said Brandon Berger, worldwide chief digital officer at Ogilvy & Mather



Wealth Graph



U.S. World Politics Entertainment Health Tech ...

The 10 Wealthiest Networking Kings and Queens

Tweet 70

Share 0

Text Size Print View All

By SUSANNA KIM (@skimm)



Jan. 31, 2013



BILL GATES 1. >

Money may not be everything, but maybe power is. According to a new list of the most influential and wealthiest people, you don't have to be the richest to be the most "influential."

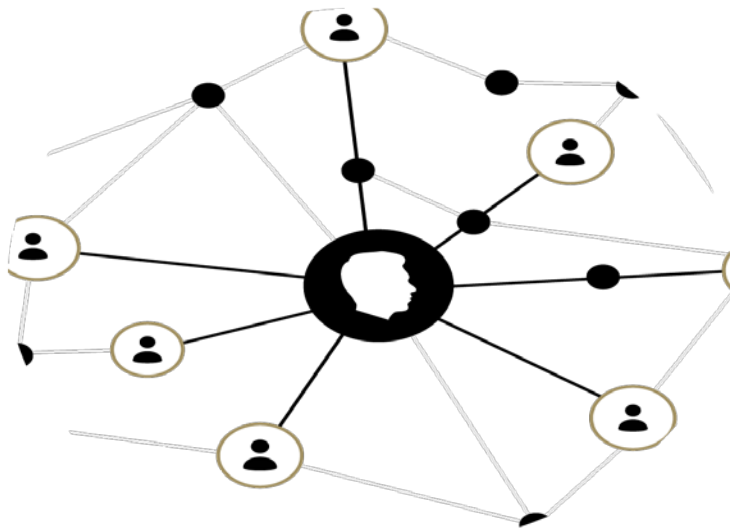
Wealth-X, a company based in Singapore which has a proprietary database of individuals worth \$30 million or more, has compiled a list of the 50 most influential ultra high

net worth individuals, based on the collective net worth of their social and professional networks.



J. . Scott Applewhite/AP

Valuable Social Graph



Business jet owners' social graph worth:
US\$ 1.1 trillion

Superyacht owners' social graph worth: **US\$ 710 billion**

Why Referrals?

“The last hundred years have been defined by the mass media. In the next hundred years, information won’t be just pushed out to people. It will be shared among the millions of connections people have...**Nothing influences people more than a recommendation from a trusted friend...**A trusted referral is the Holy Grail of advertising.”

-- Mark Zuckerberg

Referrals are Cost Effective

“Referrals generate more than half of the site’s new customer, creating multiple economic advantages across the businesses...eBay relies more on word of mouth than on advertising and traditional marketing. The company has found that **referred customers cost less to serve** because they’ve already been coached by a promoter on how the site works.”

--The Ultimate Question, Fred Reichheld

Targeted Events (No “Hope Marketing”)

Case Study: Bespoke Marketing Event

- **Challenge**

- Global Luxury Client wanted to target specific UHNW individuals at an Oil & Gas conference.

- **Solution:**

Bespoke Marketing Campaign

- Wealth-X Screening: Identified UHNW prospects.
- Our Global Luxury Client then sent cold invitations to those prospects for a marketing event that was hosted with another Wealth-X fashion client.

ITEMS	RESULTS
Conference Attendee List	500
UHNW Identified	50
% Target	10%
Invites Sent	50
RSVPs	40
Percent Accepted	80%
Follow up Flight Demos	8
Planes Sold	5

Bespoke Marketing Methodology Data Driven & Predictive Analytics Sales & Marketing

Key Bespoke Marketing Strategic Planning Steps

1. Uncover your detailed target client profile through screening and client analytics and future target profiles using affinity clustering
2. Apply UHNW archetype to:
 - Existing data set to surface golden needles in the Haystack
 - Social graph of key ambassadors of the brand for warm prospects
 - Geographic segmentation of Wealth-X database
3. Understand through deep intelligence
4. Engage through deployment by both retail and institutional:
 - Direct referrals
 - Bespoke Marketing Events based on affinity clustering and passions/hobbies/interests
 - Sponsorship investments based on affinity clustering
 - Monitoring dynamic news and alerts around this collection of target UHNW prospects

Surfacing the Golden Needles in the Haystack

What Key Client Intelligence Could Look Like

1

SCREENING



Screen & Unearth UHNW individuals within your dataset

2

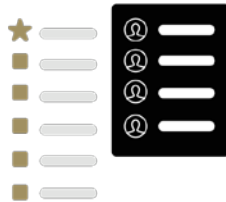
KEY UHNW INDIVIDUALS



Identify key UHNW individuals segmented to your region

3

NEW CLIENTS DELIVERED TO YOU



List of potential new clients integrated into your Wealth-X Professional Favourites list

4

ENGAGE



Download dossiers of individual prospects directly and devise bespoke strategies to upsell and engage

5

CONNECT



From your Favourites List, we will populate Friends of Favourites, providing you a Future Client List

6

FUTURE CLIENTS



An email notification alert will be sent to you when there are dossiers on new prospects

The Future: Big Data Driven Marketing

- **Intelligence and Data:**
 - Greater ability to customize content to connect with the UHNW consumer
- **Integration of Data with CRM Systems:**
 - Allow global organizations to have a 360 degree view unified across a global platform

Accelerate micro-targeting of based on key characteristics

Jefferson Walker Kirby

Business Biography

Overseas grandfather Fred Morgan Kirby started a two-and-a-half store in 1934, bought his partner out 3 years later. Chase retail chain to 64 stores before merging with P. B. Wadsworth Company. Kirby became one of America's richest men. Left retail was believed to be a failure approaching \$82 million to his son, Allen P. Kirby, who remained involved with Wadsworth, soon also bought what is now Allegheny Corporation, an investment holding company that originally focused on railroad operations. By the early 1950s, Allen Kirby's fortune was estimated to be nearly \$300 million. His son, Fred Morgan Kirby II, gained majority control of his father's holdings—both corporate and philanthropic—after a long family dispute that left the family's strained relationships in tatters. In 1992, Fred Morgan Kirby II removed his siblings from leadership positions at the F. M. Kirby Foundation, replacing them with his wife and children. He described the resulting change as a difference of opinion, while his siblings described his actions as a betrayal, sneaky, dishonest move. Jefferson Kirby graduated from Lafayette College in 1984, took jobs as an analyst at Morgan Stanley. Earned MBA from Duke University in 1987, went to work at Allegheny, where his father was the Chairman. Worked way up the corporate ladder to become Chairman after his uncle resigned, with father, controls 2.5% of the company's shares. Today devotes time to running hedge fund Broadfield Capital Management, which is based in Montclair, New Jersey. Also an investor of Somerset Hills Bancorp. Passionate college football fan is a dedicated philanthropist, has four children with wife, Karen.

Company	Position Held	Date Started	Date Ended	Remarks
Allegheny	Vice President	1984	2003	Vice President of Allegheny from 1984 to 2004.
Allegheny	Director	1992	1994	Served as Director of Allegheny from 1992 to 1994.
Bankers Trust	Associate	1987	1987	Associate at Bankers Trust from 1987 to 1992.
Morgan Stanley International	Analyst	1984	1985	Analyst at Morgan Stanley International from 1984 to 1985.
Heinrich Packard	Director			Former Director at Heinrich Packard.

Class	Asset Value	Asset Description
Alternative Assets	At least \$1 million	Home in Montclair, New Jersey
Investment Assets	At least \$1 million	Apartment in Telusville, Colorado

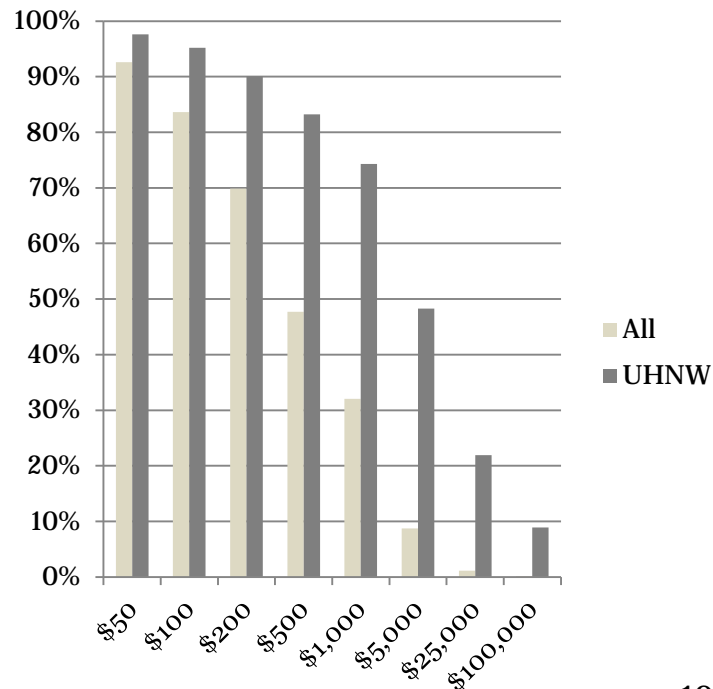
Created By: Bidwan Aminuddin 21/02/2012 6:35 PM

Global Luxury Diversified

Top Global Retailer – Top 10 US retail markets

- 99,666 records
- 292 UHNW true matches (0.29%), combined wealth \$45bn
- 2.4% of US billionaires
- 2,370 UHNW Known Associates, worth \$437bn

Match Quality	30 – 50m	50 – 100m	100 – 250m	250 – 1bn	> 1bn	TOTAL	Combined Wealth (\$)
True	202	24	35	24	7	292	44.56bn
High	13	2		1		16	0.92bn
Medium	8					8	0.24bn
Low	25			1		26	1.25bn
TOTAL	248	26	35	26	7	342	46.97bn



Client Analytics: Affinity Clustering

Characteristic	Average UHNW Client	Rank	Hobby or Interest	Client UHNW %	All UHNW % (rank)
Gender	Male	1	Philanthropy	44.8%	33.9% (1)
Marital Status	Married	2	Management	31.3%	28% (2)
Age	60-69 (average: 62.7)	3	Education	28.1%	22.4% (3)
Ethnicity	Caucasian	4	Hunting	25.0%	10.1% (14)
Religion	Christian	5	Aviation	21.9%	11.9% (12)
Location	Georgia / Illinois	6	Entrepreneurship	21.9%	22.2% (4)
Net Worth	\$153m	7	Art	20.8%	14.9% (7)
Liquidity	\$140m (median: \$50m)	8	Fishing	17.7%	9.5% (16)
Source of Wealth	Self-made	9	Investment	15.6%	17.9% (5)
		10	Leadership	14.6%	8.6% (19)



Dynamic News & Alerts & Warm Referrals

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DASHBOARD FAVOURITES FRIENDS OF FAVOURITES NOTIFICATION CENTER DAILY NEWS

Dear David,

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.

53 Favourites | **716 UHNW Known Associates** | **\$93.2 Bn** Total Sum of Net Worth of 716 UHNW Known Associates

FAVOURITES	FRIENDS OF FAVOURITES
Shashikant Nand Kishore RUIA Essar Group, Chairman Net Worth: \$2.2 billion Mumbai, Maharashtra, India 4 UHNW Known Associates, \$5.1 billion	4,254 Friends of Favourites in your network 716 UHNW Friends of Favourites in your network
Masayoshi SON Softbank Mobile, Chairman Net Worth: \$2.2 billion Tokyo, Japan 49 UHNW Known Associates, \$21.6 billion	Kay Peng KHOO Malayan United Industries, Chairman and CEO Net Worth: \$275 million Kuala Lumpur, Malaysia
Robert Muse BASS Keystone Group, President Net Worth: \$2.9 billion New York, New York, United States 35 UHNW Known Associates, \$34.2 billion	Hiroataka SUGIYAMA Mitsubishi Estate, CEO Net Worth: \$13.2 million Tokyo, Japan
Jerry Chih-Yuan YANG AME Cloud Ventures, Founding Partner Net Worth: \$2.5 billion Los Altos Hills, California, United States 10 UHNW Known Associates, \$0.7 billion	Kay Peng KHOO Malayan United Industries, Chairman and CEO Net Worth: \$275 million Kuala Lumpur, Malaysia

VIEW MORE FAVOURITES

VIEW MORE FRIENDS OF FAVOURITES

NOTIFICATION CENTER

19 Completed Dossiers Requests

1,472 Edits on Friends of Favourites in your network

58 New UHNW Known Associates added to your network

Shashikant Nand Kishore RUIA
UPDATE: Family Details

Masayoshi SON
NEW: 8 UHNW Known Associates Added

Anthony Francis FERNANDES
UPDATE: Interests, Passions, Hobbies

Doris F. Fisher
UPDATE: Philanthropy

Dong MEI
UPDATE: Service Provider

Robert Muse BASS
UPDATE: Interests, Passions, Hobbies

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Jack Ma Could Net US\$6.6 Billion Windfall From Alibaba IPO

UHNW Chinese Big Spenders Flock To Hong Kong For Art Basel

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Search favourites list...

	Shashikant Nand Kishore RUIA Essar Group, Chairman Net Worth: \$2.2 billion Mumbai, Maharashtra, India 4 UHNW Known Associates, \$5.1 billion	+
	Masayoshi SON Softbank Mobile, Chairman Net Worth: \$8.8 billion Tokyo, Japan 49 UHNW Known Associates, \$21.6 billion	+
	Robert Muse BASS Keystone Group, President Net Worth: \$2.9 billion New York, New York, United States 35 UHNW Known Associates, \$34.2 billion	+
	Tat Cheong CHIU Far East Consortium International, Chairman Net Worth: \$550 million Hong Kong 12 UHNW Known Associates, \$2.8 billion	+
	Edmund John Philip BROWNE Riverstone Holdings, Partner Net Worth: \$180 million London, Greater London, United Kingdom 39 UHNW Known Associates, \$18.7 billion	+
	Helen Roice HAMLYN Helen Hamlyn Trust, Trustee Net Worth: \$180 million London, Greater London, United Kingdom 1 UHNW Known Associates, \$80 million	+

Welcome back, David Friedman

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DASHBOARD FAVOURITES FRIENDS OF FAVOURITES NOTIFICATION CENTER DAILY NEWS

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.

4,254 Friends of Favourites in your network | **716** UHNW Known Associates | **54** Average Age of UHNW Known Associates

\$93.2 Bn Total Sum of Net Worth of 716 UHNW Known Associates | **68%** of UHNW Known Associates in your network are Self-Made

Known Associates	Relationship
Hiroataka SUGIYAMA Mitsubishi Estate, CEO Net Worth: \$13.2 million Tokyo, Japan Known Associates: Piyush GUPTA, Anthony FERNANDES	Business Social +
Kay Peng KHOO Malayan United Industries, Chairman and CEO Net Worth: \$275 million Kuala Lumpur, Malaysia Known Associates: Hock Nien KUOK, Sock Ping YEOH, Gui Ping Zhan	Business Social +
Richard Charles NICHOLAS Virgin Group, Chairman Net Worth: \$4.1 billion Surrey, United Kingdom Known Associates: Shashikant RUIA, Anthony Blair	Business Social +
Dong MEI AME Cloud Ventures, Executive Director Net Worth: \$18 million Changshu, Jiangsu, China Known Associates: Dekang GAO, Fei WANG	Non-Profit/University Board Social +
Jerry Chih-Yuan YANG AME Cloud Ventures, Founding Partner Net Worth: \$2.5 billion Los Altos Hills, California, United States Known Associates: Shashikant RUIA, Anthony Blair	Business Social +

Dynamic News Allows Monitoring for Opportunities to Engage

DASHBOARD
FAVOURITES
FRIENDS OF FAVOURITES
NOTIFICATION CENTER
DAILY NEWS

Wealth-X News is a unique digital intelligence and analysis platform collating daily news and exclusive features about the global UHNW population.
An indispensable global guide to UHNW "money in motion", Wealth-X News provides up-to-the-minute analysis on the fluctuations of the assets of the ultra wealthy.
Readers can customize the content they see on Wealth-X Professional.

Daily News

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NORTH AMERICA

EUROPE

MENA

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Global UHNW News - North America

America Moved Unable To Buy AT&T's US\$5.76 Billion Stake

Israel Chemicals Pulls Back US\$1 Billion Investment

Facebook, Publics Strike US\$500 Million Marketing Deal

ActaZeneca Rejects Pfizer's "Final" US\$120 Billion Offer

Google Expands Portfolio With Acquisition Of Start-Up Ordo

J&J Steel Acquires Rival Walspun Maxsteel For US\$185 Million

Russett Mulling Major Expansion Of Igor Sechin's Powers

Sipchem Eyes Growth Amid Merger Meltdown

Rich Insights

Sebastiano Cossia Casigliani, Founder Of Opteres Art Advisory

Alain Li, CEO of Richemont for Asia-Pacific

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1. KKR's Henry Kravis Donates US\$100 Million To Sloan Kettering

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3. Energy Giant Saudi Aramco To Set Up Gas Station Network

4. From The Backstreets Of Bangkok To A Billionaire Philanthropist

5. "Wolf Of Wall Street" Bellfort Expecting US\$100 Million Payday

6. Kameel's Al Baraka To Launch Islamic Bonds In South Africa

7. NBA Commissioner Looks To Strike A Deal With Sterling

8. Ethad Ups Stake In Branson's Virgin Australia

9. Billionaire James Obyson Donates US\$13 Million To Cambridge University

10. Energy Giant Saudi Aramco To Set Up Gas Station Network

Feature Articles

Jack Ma Could Net US\$6.6 Billion Windfall From Alibaba IPO

UHNW Chinese Big Spenders Flock To Hong Kong For Art Basel

Modi's Election: A Boost For India's Luxury Property Market?

DASHBOARD
FAVOURITES
FRIENDS OF FAVOURITES
NOTIFICATION CENTER
DAILY NEWS

Welcome to your Notification Center

The Wealth-X Notification Center is a new feature that provides an overview of alerts and updates from your Favourites list and Friends of Favourites.

This feature displays notifications in two tiers:

- (Low Priority) Notification Feed in Wealth-X Professional.
- (High Priority) Email Notifications Alerts.

Users may choose the categories below to appear in Email Notification Alerts.

Email Notification Alerts Settings:

BIOGRAPHY
CAREER HISTORY
EDUCATION HISTORY
INTERESTING FACTS
WEALTH ANALYSIS
PHILANTHROPY
INTERESTS, PASSIONS & HOBBIES
CLUBS & BOARDS
KNOWN ASSOCIATES
NEWS
SERVICE PROVIDERS
FAMILY DETAILS
BANKRUPTCY
POLITICAL INTEREST
SIGNIFICANT LITIGATION
PRIVATE FOUNDATION(S)
FAMILY OFFICES(S)
BUSINESS CONTACT INFORMATION

Save Settings

11 Completed Dossiers Requests since 15th June 2014

1,472 Edits On Friends of Favorites Network

58 New UHNW Known Associates added to your network

Shashikant Nand Kishore RUIA
UPDATE: Family Details

Masayoshi SON
NEW: 8 UHNW Known Associates Added

Anthony Francis FERNANDES
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Doris F. Fisher
UPDATE: Philanthropy

Dong MEI
UPDATE: Service Provider

Chiu Wai LEUNG
UPDATE: Career History

Robert Muse BASS
UPDATE: Interests, Passion, Hobbies

Anish KAPOOR
UPDATE: Service Provider

David Mark Rubenstein
UPDATE: Career History

Dekang GAO
UPDATE: Interests, Passion, Hobbies

iPad and iPhone Access



Content & Digital Marketing

Digital Marketing: Still Nascent

68% of respondents feel UHNW clients do not respond to digital marketing

- Only 25% of respondents say they use online marketing to engage with UHNW clients
- 84% of respondents feel digital marketing is particularly useful in brand awareness

Content is the “New Black”



ARTON CAPITAL



The Telegraph
LUXURY

Home

Our Experts

The Diary

Pictures

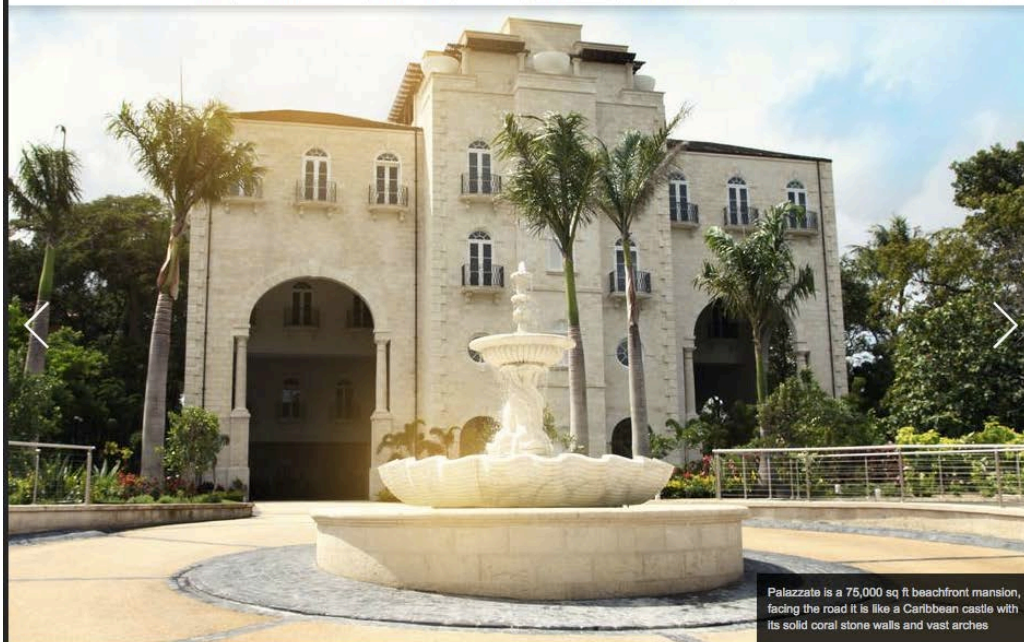
Topics

My Notebook

Q

Sign In

Register



Palazzate is a 75,000 sq ft beachfront mansion, facing the road it is like a Caribbean castle with its solid coral stone walls and vast arches

PROPERTY & ARCHITECTURE

Barbados's \$125m house



MORE LIKE THIS

Social Media and the UHNW Market

- They are online
- But for a majority, they are “LinkedOut”:
 - They are not on Facebook
 - They are not on LinkedIn
 - Except for financial services and digerati

Nerds Dinner at Davos

“Larry, do you use Facebook?”

“No, not really,” Page replies without affect in his high-pitched nasal voice. Zuckerberg seems disappointed.

“Why not?” he persists.

“It’s not really designed for me,” Page answers. Zuckerberg starts to ask him another questions, but is deterred by Sandberg.

“Mark! Don’t talk about that in front of David!” she scolds.

-- David Kirkpatrick, *The Facebook Effect*

The Power to “Convene”



The Near Future

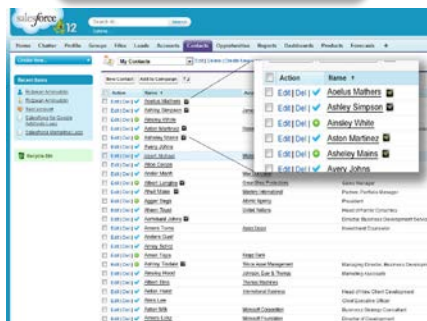
The Future of UHNW Advertising

Your Data

CRM

Segmenting

Full Name	Age	Marital Status	Gender	Primary Company	Business Address	City Name	State Name	Business Phone
1. Aja Singh	32	Married	Male	ACC Worldwide	131, Kandell Industrial Estate, Kandell (Vello)	Mumbai	Maharashtra	885 067
2. Anthony W. Palma	32	Unknown	Male	Bond and Canal	Bank of America Centre, 380 North Charge Avenue	Orlando	Florida	328.01.8842
3. Charles C. Johnson	39	Unknown	Male	Venture Technology	1291 SW 26th Avenue	Pompano Beach	Florida	305.98
4. Denny Chakrabarti	40	Married	Male	BEICO Capital	Office No. 1003 Governor Business Tower-South, Dubai	Dubai	UAE	044.00
5. Denny Campbell	44	Married	Male	Ambassadors Gray Line	3790 Mackintosh Street	Hallandale	Florida	855.544
6. David J. Wilson	44	Unknown	Male	Musical of American Finance	49 Wall Street	New York	New York	212.85
7. David D. Thomson	44	Unknown	Male	Western Reserve Partners	200 Public Square, Suite 3700	Cleveland	Ohio	441.14
8. Nites Choudhary Datta	44	Unknown	Male	Venture Whipping Corrie, Central Avenue	2301 Wilshire Boulevard, Suite 420	Malibu	California	405.076
9. Douglas B. Threlker	44	Unknown	Male	Bison Capital	233 Wilshire Boulevard, Suite 420	Malibu	California	405.076
10. Eugene Ernest Stearns	50	Married	Male	Stearns Weaver Miller Winkler Althoff	10000 Wilshire Boulevard, Suite 2000	Los Angeles	California	310.33
11. Evan Michael Stone	36	Married	Male	Pacific Union Financial	1385 North Broadway, Suite 420	Walnut Creek	California	949.86
12. Douglas K. Chabais	36	Married	Male	Genovet Group	401-404, Dynasty Business Park, 3rd Floor, Karachi	Mumbai	Maharashtra	400.099
13. Haggai Karil	36	Unknown	Male	Chikman Group, Co	3 Daniel Fink Street	Tel Aviv	Israel	447.71
14. Clyne Williams	36	Married	Male	Bellman Associates	95 Street, Clair Avenue West, Suite 1407	Toronto	Ontario	416.544
15. Hemant Kumar	36	Unknown	Male	Small Enterprise Assistance Funds (SEAF)	1/204, Jade Garden, Opposite MRC, Chik, Kalamang	Mumbai	Maharashtra	400.081
16. Hameed Vikram Thattai	32	Married	Male	Thattai Group	99 Hook Road, Section 3	Singapore	Singapore	7362

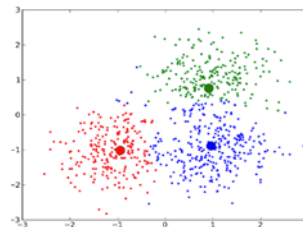


PRINCIPAL UHNW MATCHES							
MATCH QUALITY	30-50M	50-100M	100-250M	250M-50M	>5M	TOTAL	COMBINED WEALTH US\$ Billion
TRUE	103	63	24	15	5	210	46.42B
HIGH	38	15	9	9	5	73	10.39B
MEDIUM	77	36	10	1	2	124	7.70B
LOW	134	82	12	3		232	16.41B
TOTAL	348	196	55	28	1	639	80.96B

Mass Affluent/
HNW

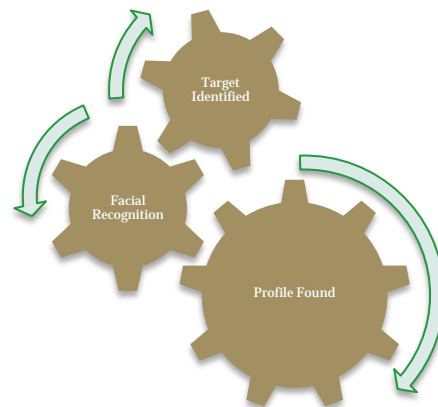
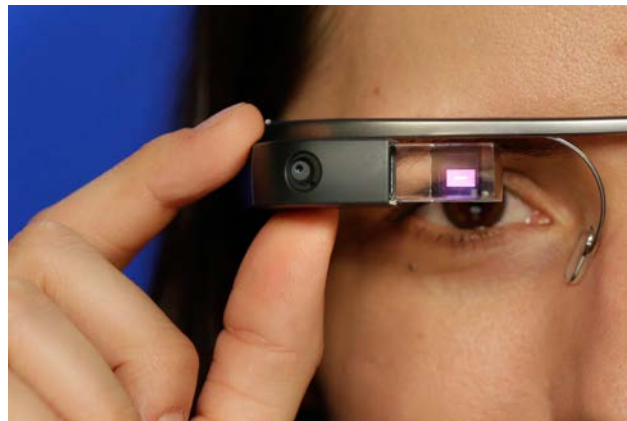
Digital
Marketing by
Segment

Targeted UHNW



LiveRamp

Taking Technology & Data Further



UHNW

Nazek Asaad Oudeh AL HARIRI

Estimated Net Worth

At least \$1.7 billion

Estimated Liquid Assets

At least \$570 million

Hobby Name

Education

Fashion

Finance - Accounting

Human Rights - Women's Rights

Travel

Family

Luxury Lifestyle

Philanthropy

Business - Leadership

Connect With Us

David S. Friedman

President

dfriedman@wealthx.com

www.billionairecensus.com

www.wealthx.com/wealthxubswealthreport

