

# I LOVE MY TECHNOLOGY...

## BUT THERE ARE LIMITS...

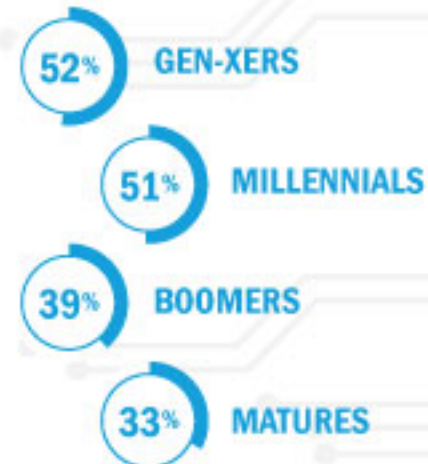
90%

of Americans view technology as more of a life necessity than a distraction

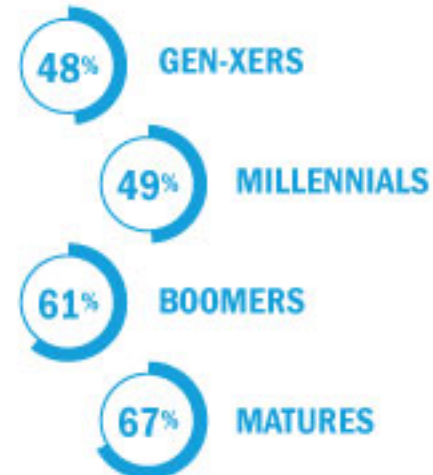
Technology is the preferred mode for straightforward transactions like...



Younger generations are more likely to prefer to automate investing decisions



... and less likely to want to discuss investing strategies with a professional



When asked to choose between relying on a financial advisor and a computer algorithm for managing their portfolios, **two-thirds** of all respondents say they still prefer the **human touch**

All generations prefer to interact in person when dealing with...



66%

Millennials are more likely to turn toward **familiar sources** like their parents instead of seeking answers online on financial matters.

57%

Millennials are more likely than any other generation to **feel relief** from leaving their devices at home when vacationing...while Matures are most likely to **feel anxiety** (60%)

charles  
SCHWAB

### ABOUT THE SURVEY

The survey was conducted by Charles Schwab, one of the largest full-service investment services firms in the country with \$2.53 trillion in total client assets, and Koski Research. The online survey was fielded between February 18 and 26 among 1,808 consumers. The margin of error for the total survey sample is 2.3 percentage points.

### ABOUT CHARLES SCHWAB

At Charles Schwab, we believe in the power of investing to help individuals create a better tomorrow. We have a history of challenging the status quo in our industry, innovating in ways that benefit investors and the advisors and employers who serve them, and championing our clients' goals with passion and integrity. More information is available at [www.aboutschwab.com](http://www.aboutschwab.com). Follow us on Twitter, Facebook, YouTube and LinkedIn.

(0515-3657)