2026 High-Net-Worth Financial Products Report

A benchmark study examining how high-net-worth households use financial products and recommend providers

CONDUCTED BY

Long Angle

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Top 10 Takeaways:
2026 HNW Financial Products

1.
Amex and Chase are resting on their laurels

Amex Platinum, Chase Sapphire Reserve are less recommended than competing cards

2.
Travel rewards and cash back are the true credit card priorities

Shopping and entertainment credits aren't as valued by customers as advertised

3.
Brokerages beat banks at banking

Fidelity and Schwab are better rated for banking and lending than Chase, BofA, Wells Fargo

4.
Fidelity and Schwab are in a league of their own

Brokerage duopoly, with exceptional customer advocacy across product lines

5.
Vanguard funds are a staple, regardless of brokerage

Two-thirds of investors take advantage of low-fee funds like VTI, VOO, VXUS

6.
Spreadsheets are still the #1 way to track your total portfolio

Google Sheets and Excel are the most common ways to view portfolios across accounts

7.
Rocket Mortgage is preferred over big banks

Chase, BofA, Wells Fargo aren't delivering on expectations

8.
HNW specialty insurers are the gold standard

Cincinnati and PURE are highly recommended over State Farm and other generalist carriers

9.
Umbrella insurance is standard above $5M net worth

8 in 10 with $5M+ wealth have umbrella insurance

10.
Life insurance customers regret their carriers

Northwestern Mutual and MetLife have especially poor approval ratings

Long Angle

Methodology

The **2026 High-Net-Worth Financial Products Report** presents Long Angle's inaugural study on the financial products used and recommended by high-net-worth households. Categories span credit cards, banking, brokerages, lending, insurance, and more.

This year's survey was conducted in July 2026, drawing insights from 165 respondents. All participants are members of Long Angle, a private, vetted community of over 9,000 individual investors, entrepreneurs, and executives. The respondent profile is uniquely positioned within the HNW landscape:

- 81% have over $5M in net worth
- 75% are under the age of 55
- 92% are based in the United States

Note: All figures are self-reported. Long Angle's membership may not be representative of the broader HNW population. **Findings based on a low respondent count are marked with an asterisk (*)** and should be interpreted with caution.

Survey Questions: Participants were asked who their providers are across financial and insurance products, if they would recommend their provider to their peers (Yes / Unsure / No), and other category-specific questions. Throughout this report, % Recommend refers to the share who answered Yes. Respondents were also given the option to leave a comment about their provider for peers looking for recommendations.

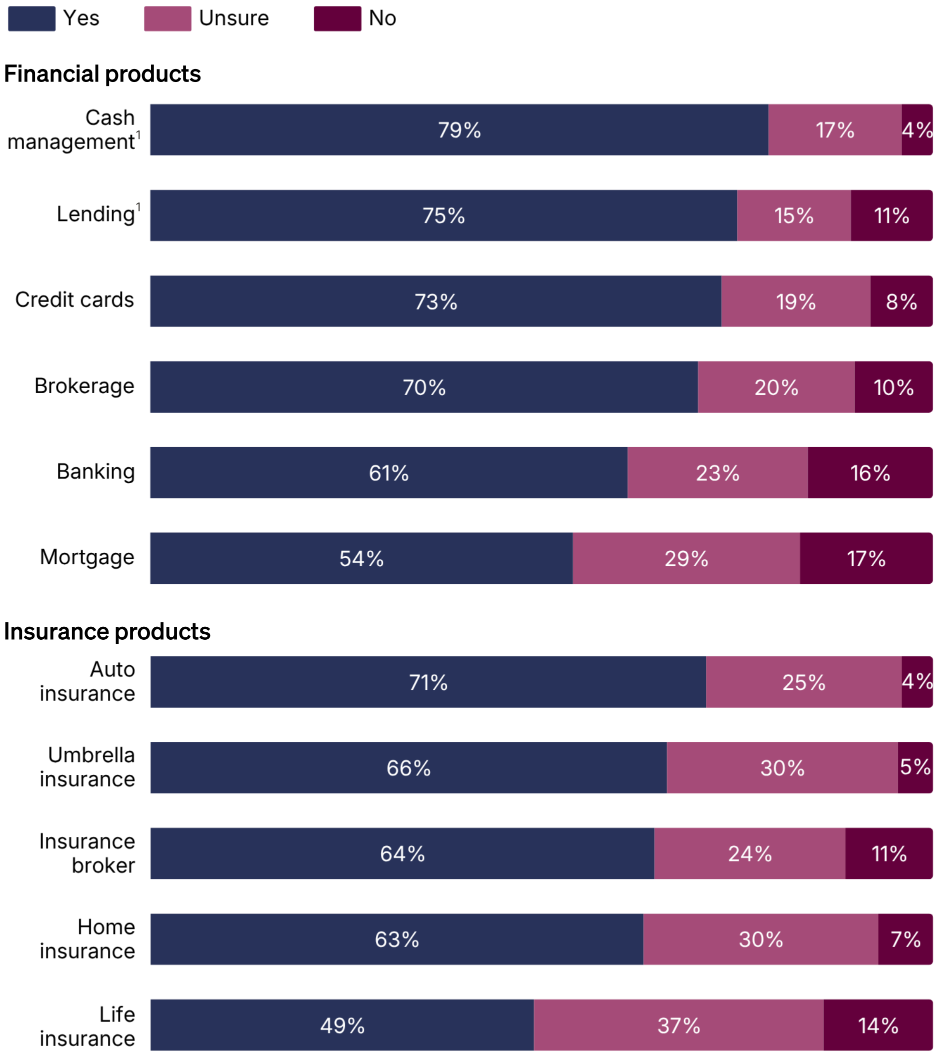
Definitions: Credit Cards exclude business cards. Banking refers to checking or transactional accounts, while Cash management refers to saving and storing cash. Brokerage includes personal accounts only and excludes employer-provided accounts (e.g., 401(k) platforms). Lending, Mortgage, and all Insurance products are among US respondents only.

Overview

HNW households are loyal to their brokerages for investing, cash management, lending; banks and life insurers fall short

Likelihood to recommend financial providers

% of users of each product



Note: Category definitions on page 4

1 Brokerages are the most commonly used providers for cash management and lending

Big banks and premium credit cards get beat on customer advocacy

Likelihood to recommend financial providers

% of users of each product; top 3 most-used providers in each category

Financial product	% Recommend
Credit cards	
Amazon Prime Visa	90%
Amex Platinum	82%
Chase Sapphire Reserve	70%
Banking	
Chase	70%
Bank of America	48%
Wells Fargo	39%
Cash management	
Fidelity	91%
Schwab	88%
Vanguard	75%
Brokerage	
Schwab	86%
Fidelity	86%
Vanguard	70%
Lending	
J.P. Morgan / Private Bank[1]*	100%
Schwab	91%
Fidelity	86%
Mortgage	
Rocket Mortgage	67%
Chase	43%
Wells Fargo*	40%

Amazon Prime Visa is more recommended than premium cards Amex Platinum and Chase Sapphire Reserve.

BofA and Wells Fargo aren't widely endorsed, referred to as legacy accounts.

Fidelity and Schwab customers give near-unanimous approval across multiple product lines.

Fidelity and Schwab brokerage users praise their consistent customer service, reliability, and platform experience.

J.P. Morgan is revered for lending, though by a smaller respondent base.

Rocket Mortgage is well ahead of Chase and Wells Fargo in the eyes of borrowers.

1 J.P. Morgan / Private Bank refers to J.P. Morgan Wealth Management, Private Client, and Private Bank

* Low respondent count

Specialty insurers outshine standard carriers in home and umbrella coverage

Likelihood to recommend insurance carriers

% of users of each product; top 3 most-used carriers in each category

Insurance product	% Recommend
Home insurance	
Cincinnati	88%
Farmers	50%
State Farm	43%
Auto insurance	
GEICO	83%
State Farm	54%
Progressive	47%
Umbrella insurance	
Cincinnati	78%
Chubb	70%
State Farm	44%
Life insurance	
Lincoln Financial*	67%
Prudential*	60%
Northwestern Mutual*	20%

Cincinnati's home insurance earns the highest recommendation rate among the most-used carriers across all insurance categories.

State Farm is given mediocre ratings across product lines.

Respondents point out Cincinnati's high umbrella policy limits as a standout benefit.

Northwestern Mutual is the most common life insurer, but least likely to be recommended.

Credit Cards

Amex Platinum and Chase Sapphire Reserve are in a two-horse race for users, but middle of the pack in loyalty

Credit cards among HNW households

% of respondents who use; % who recommend their card

Credit card	% Use	% Recommend
Travel cards		
Amex Platinum	31%	82%
Chase Sapphire Reserve	30%	70%
Chase Sapphire Preferred	12%	83%
Amex Gold	9%	73%
Capital One Venture X	8%	92%
BofA Premium Rewards / Elite	5%	100%
Cash back cards		
Amazon Prime Visa	18%	90%
Chase Freedom Unlimited	14%	60%
Fidelity Rewards	10%	94%
Citi Costco	9%	100%
Citi Double Cash	9%	93%
Apple Card	8%	86%
Amex Blue Cash[1]	8%	25%
BofA Cash Rewards[2]	6%	70%
Coinbase One*	4%	71%
U.S. Bank Smartly*	4%	43%
Wells Fargo Active Cash*	4%	86%
Robinhood Gold*	4%	100%
Airline cards		
United Mileageplus[3]	10%	65%
Delta Skymiles Amex	7%	83%
Citi / AAdvantage	5%	44%
Alaska ATMOS*	4%	71%
Southwest Rapid Rewards*	4%	86%
Other cards		
BILT*	4%	71%
Marriott Bonvoy*	4%	57%

Amex Platinum and Chase Sapphire Reserve users call out worsening rewards: *"Used to be better, just coupon cards now"*

BofA and Capital One outperform more popular travel cards on satisfaction.

Costco and Amazon have much higher approval than premium cards.

Amex Blue Cash grocery and gas rewards underwhelm.

Robinhood Gold and its 3% cash back are universally loved among a small respondent base.

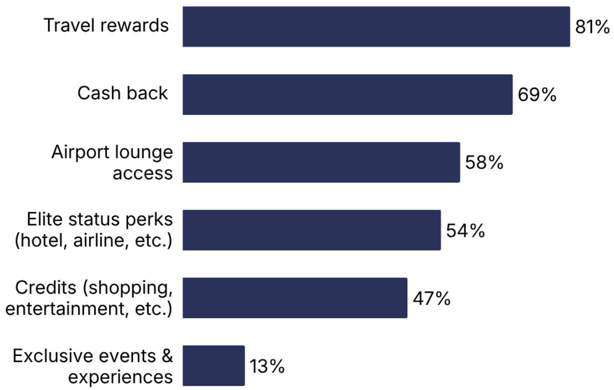
Southwest and Delta cards have the happiest customers among airlines.

1 Includes Amex Blue Cash Everyday and Preferred cards. 2 Includes Bank of America Customized and Unlimited Cash Rewards cards. 3 Includes United Club, Quest, and other card variations.

Travel rewards and cash back are most important, statement credits matter less than card issuers advertise

Why cardholders use their cards

% of respondents



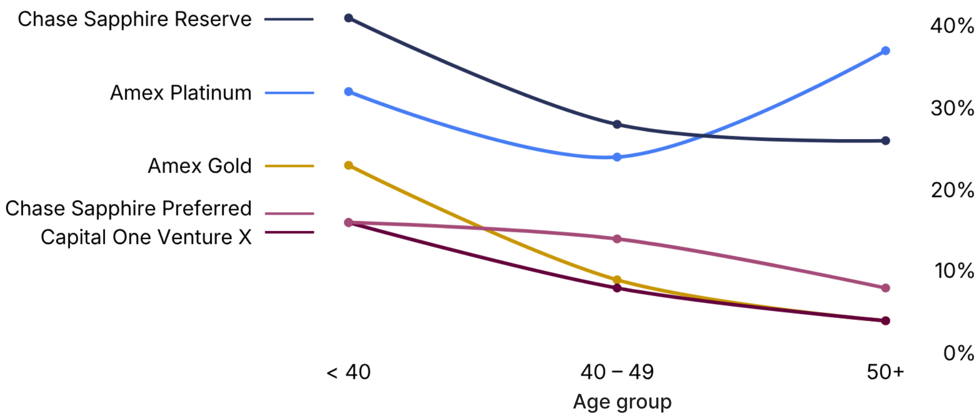
Most cardholders rack up travel rewards, and half carry separate cards for points and cash back.

Statement credits are where the value breaks down (contrary to Amex marketing). Those that take advantage share frustrations with the effort required to earn and redeem.

Chase Sapphire Reserve wins the younger crowd, Amex Platinum is tried-and-true for 50+

Travel card usage by age group

% of respondents



Amex Platinum's 50+ dominance reflects long-held habits, some having it for decades. Amex Platinum users report the highest median monthly spend ($8K) among the cards shown above.

Cash back card rankings reveal even the ultra-wealthy carry an Amazon card

Cash back card usage by net worth

Top 3 most-used cards; % of respondents who use

Usage Ranking	$2M – $5M	$5M – $10M	$10M – $25M	$25M+
1	**Amazon Prime Visa 23%**	Chase Freedom Unlimited 16%	**Amazon Prime Visa 17%**	**Amazon Prime Visa 27%**
2	Chase Freedom Unlimited 17%	Fidelity Rewards 14%	Amex Blue Cash 15%	Chase Freedom Unlimited 14%
3	Citi Costco 13%	**Amazon Prime Visa 13%**	Apple Card 13%	Apple Card 14%

"Can't beat 5% on Prime, or if you can, tell me how :)"

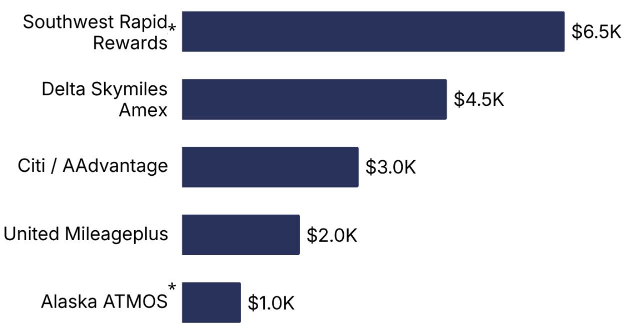
Southwest leads monthly spend on airline cards, followed by Delta

Southwest cardholders cite Companion Pass and its year of free companion flights as a standout benefit.

Similarly, Delta cardholders note Diamond Medallion Status is well worth the spending.

Median monthly spend with airline cards

USD



Banking / Cash Management

Big banks are still on top for checking / transactions, but brokerages have happier customers

Banking providers among HNW households

% of respondents who use; % who recommend their provider

Banking provider	% Use	% Recommend
Chase	22%	70%
Bank of America	20%	48%
Wells Fargo	11%	39%
Fidelity	10%	93%
Schwab	7%	90%
Ally	6%	78%
Capital One	5%	75%
J.P. Morgan / Private Bank*	4%	100%
USAA*	4%	67%
U.S. Bank*	4%	33%

BofA, WF customers stick around out of convenience: *"Necessary evil"*

Schwab's free ATM access and brokerage integration are key draws.

J.P. Morgan's loyal base applauds the white-glove service.

Brokerages are the go-to destinations for saving and storing cash

Cash management providers among HNW households

% of respondents who use; % who recommend their provider

Cash management provider	% Use	% Recommend
Fidelity	28%	91%
Schwab	27%	88%
Vanguard	13%	75%
Wealthfront	7%	89%
Capital One	6%	71%
Ally	5%	50%
Chase*	4%	40%
J.P. Morgan / Private Bank*	4%	60%
Marcus*	4%	100%

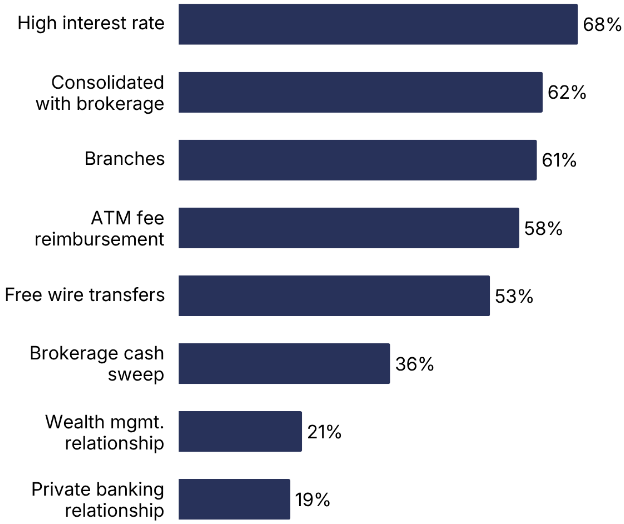
Brokerages are increasingly used as one-stop shops. One Fidelity customer said: *"Barely even need a 'real' bank just by using a brokerage account"*

Digital banks are either hit (Marcus, Wealthfront) or miss (Ally).

Most valued benefit in banking is a high interest rate, but branches are still important

Why customers use their bank/cash management accounts

% of respondents



The top 2 reasons are exactly where brokerages have the edge over big banks.

Branches remain valued even at lower-rated banks.

Most respondents are self-managed investors, so wealth management / private banking adoption skews low.

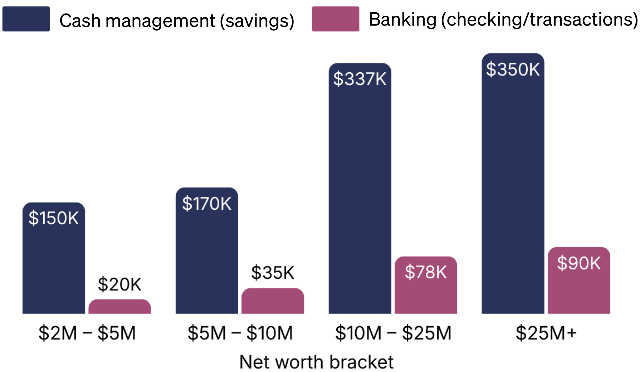
Cash balances rise significantly beyond $10M in net worth

The largest median account balances (serving the highest wealth tiers) are held at:

- J.P. Morgan / J.P. Morgan Private Bank
- PNC / PNC Private Bank
- Morgan Stanley

Median cash management and bank account balances by net worth bracket

USD



Brokerage

Schwab and Fidelity are neck and neck for both market share and customer advocacy

Brokerages among HNW households

% of respondents who use; % who recommend their brokerage

Brokerage	% Use	% Recommend
Schwab	45%	86%
Fidelity	43%	86%
Vanguard	28%	70%
Merrill Lynch	10%	47%
Robinhood	8%	54%
E*TRADE	7%	45%
Interactive Brokers	6%	60%
J.P. Morgan / Private Bank	5%	75%
Morgan Stanley	5%	50%
Frec	5%	100%
Chase*	4%	29%

Respondents highlight Schwab and Fidelity's depth: research, filtering, transactions, security.

Several Robinhood users say they joined for transfer bonuses:

"I'll move back to Fidelity at some point"

Every Frec direct indexing customer (small sample) recommends it.

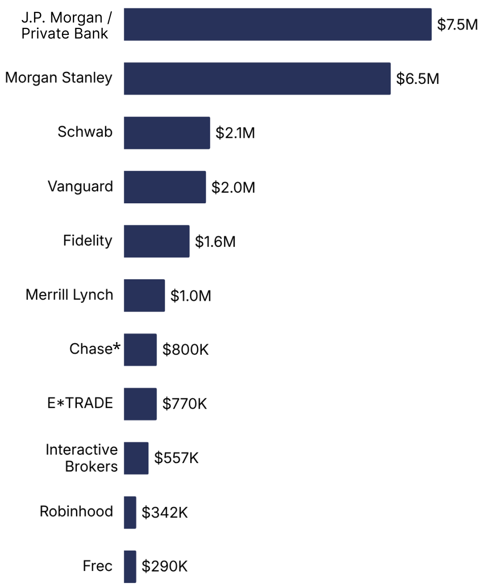
Largest account holders choose J.P. Morgan, Morgan Stanley

J.P. Morgan Private Bank clients are impressed by banker effectiveness:

"Your private banker has a surprising amount of leverage to get stuff done for you"

Median brokerage balances by provider

USD



Investors hold only a fraction of their assets in Robinhood compared to other brokerages.

Most invest in Vanguard funds, even if they don't use the brokerage

68% of respondents invest in Vanguard funds

28% of respondents have a Vanguard brokerage account

Vanguard fund adoption

% of respondents

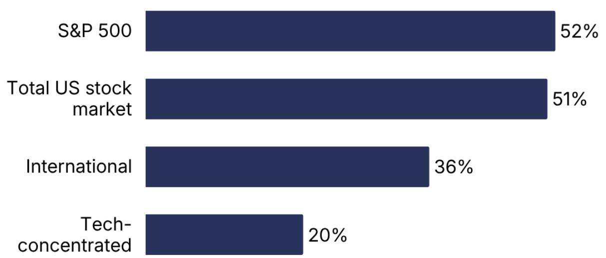
Vanguard funds	% Invest
VTI	40%
VOO	27%
VXUS	17%
VTSAX	9%
VEA	6%
VUG	5%
VEU	4%
VGT	4%
Any Vanguard fund	68%

Vanguard's low-fee ETFs and mutual funds are core holdings for investors. For comparison, QQQ and SPY would rank #s 4 and 5 on this list if expanded to all funds.

Investors divided on their primary fund strategy: S&P 500 vs. Total US Stock Market

ETF and mutual fund strategies

% of respondents



Example funds:

VOO, SPY, FXAIX, IVV, VFIAX, VFINX, SPX, VFFSX

VTI, VTSAX, FSKAX, FZROX, ITOT, SCHB

VXUS, VEA, VWO, VEU, IEFA, IEMG, SCHF, SCHE, FSPSX, FZILX, VTIAX

QQQ, QQQM, VGT, SMH, SOXX, QQQI

Investors are split between the S&P 500 (US large-cap) and the total US market (broader small/mid-cap exposure). These are historically closely correlated, so it's largely a preference call.

Portfolio / Budget Tracking

7 in 10 track their portfolios outside of brokerage apps

72% of respondents do portfolio / net worth tracking

62% of respondents do budget tracking

Spreadsheets are the most common way to track portfolios

Portfolio / net worth tracking tools among HNW households

Share of portfolio / net worth tracking users; % who recommend their tool

Portfolio / net worth tracking	Share of users	% Recommend
Manual spreadsheets[1]	40%	72%
Monarch Money	22%	88%
Empower (Personal Capital)	19%	52%
Quicken / Quicken Simplifi	10%	83%
Snowball Analytics*	4%	80%
RightCapital*	4%	80%
Yahoo Finance*	3%	25%
Kubera*	3%	75%
eMoney*	3%	25%
Boldin*	3%	75%
AI (ChatGPT, Claude)*	3%	75%

1 Includes Google Sheets and Microsoft Excel

Monarch Money, Quicken are most recommended.

Empower's high usage doesn't match its lukewarm recommend rate.

ChatGPT and Claude aren't widely used yet.

Monarch Money #1 for budget tracking, users love it

Monarch Money users laud its UX, UI and automations across budget and portfolio tracking.

Tiller delivers for its small respondent base.

Budget tracking tools among HNW households

Share of budget tracking users; % who recommend their tool

Budget tracking	Share of users	% Recommend
Monarch Money	30%	93%
Manual spreadsheets[1]	27%	76%
Quicken / Quicken Simplifi	14%	79%
AI (ChatGPT, Claude)	5%	80%
Tiller*	4%	100%
Quickbooks*	4%	60%

1 Includes Google Sheets and Microsoft Excel

Lending

Brokerages lead borrowing, top lenders are all highly recommended

Lenders among HNW households

Share of borrowers; % who recommend their lender

Lenders	Share of borrowers	% Recommend
Schwab	17%	91%
Fidelity	11%	86%
J.P. Morgan / Private Bank*	6%	100%
Frec*	6%	100%
Other	66%	66%

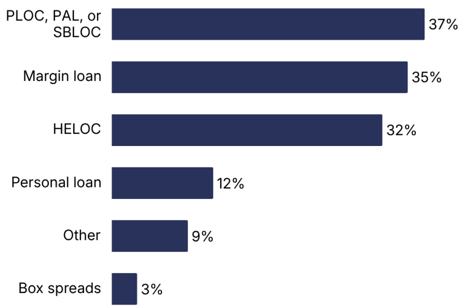
There are 4 HNW lenders with satisfied customers, then everybody else.

Frec borrowers highlight its low rates.

Portfolio-based credit lines are the most common loan types, purposes vary widely

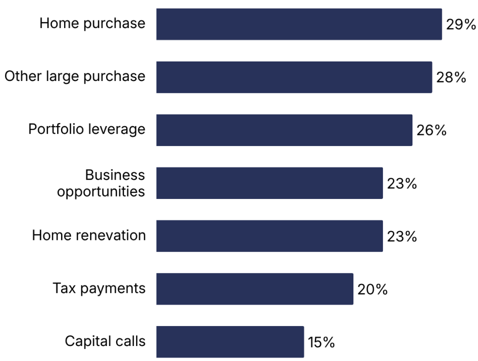
Types of loans / credit lines

% of borrowers



Purposes of loans / credit lines

% of borrowers

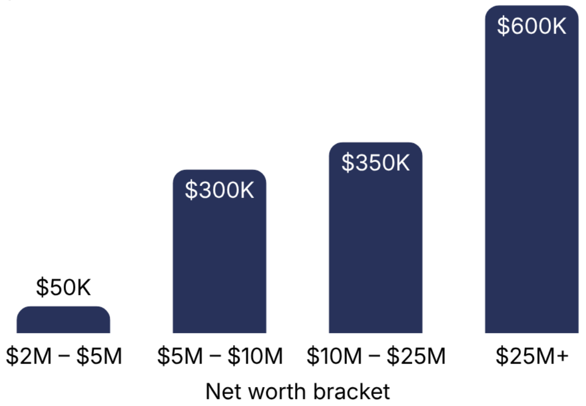


HNW borrowers use their portfolios as a general-purpose liquidity source, evidenced by the breadth of loan purposes.

Loan amounts increase substantially after $5M, $25M net worth marks

Median loan / credit line amounts by net worth bracket

USD



Loan sizes scale with available collateral, as larger portfolios and home equity support larger lines of credit.

Respondents describe using credit lines for short-term cash, drawing funds then repaying once other liquidity (like a stock sale) comes through.

J.P. Morgan / J.P. Morgan Private Bank serve the largest loans by a wide margin

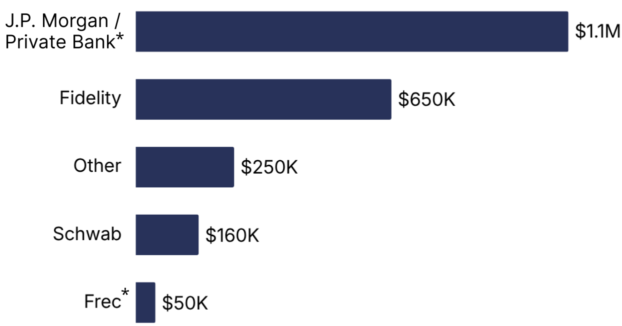
One J.P. Morgan Private Bank client described borrowing to fund opportunistic investments.

Schwab and Fidelity both had a customer describe their rates as noncompetitive. A simple piece of advice from a borrower:

"Shop lenders"

Median loan / credit line amounts by lender

USD



Mortgage

Rocket Mortgage stands out in a weak field of mortgage lenders

Mortgage lenders among HNW households

Share of those with a mortgage; % who recommend their mortgage lender

Mortgage lenders	Share with mortgage	% Recommend
Chase	9%	43%
Rocket Mortgage	8%	67%
Wells Fargo*	7%	40%
Bank of America	5%	25%
Other	71%	58%

Some Rocket Mortgage customers cite rate discounts with Schwab.

Borrowers note their mortgages being sold to a new servicer without their input, likely dampening satisfaction.

Nearly half have refinanced their mortgage

47% of respondents with a mortgage have refinanced

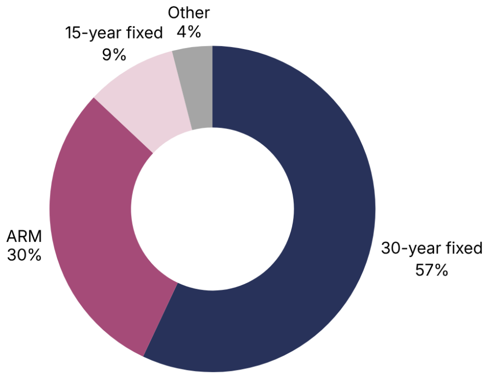
Common during the record-low rate period of 2020–2021.

Standard 30-year fixed mortgage is not universal, ARMs have considerable adoption

ARMs trade rate risk for lower initial payments. A sizeable share of respondents have made that tactical trade-off.

Types of mortgages

% of respondents with a mortgage



Home Insurance

HNW specialty insurers are highly recommended, State Farm and Farmers disappoint

Home insurance carriers among HNW households

Share of those with home insurance; % who recommend their carrier

Home insurance carriers	Share with home insurance	% Recommend
HNW specialty carriers		
Cincinnati	7%	88%
PURE	5%	100%
Chubb*	4%	75%
Standard carriers		
State Farm	19%	43%
Farmers	6%	50%
Travelers	5%	83%
Amica*	4%	75%
USAA*	4%	100%
GEICO*	4%	75%

Respondents commend premium insurers for reliably paying claims:

"PURE, Chubb, and Cincinnati are the known good paying insurance companies"

PURE, Cincinnati, and Chubb insure the highest-value homes

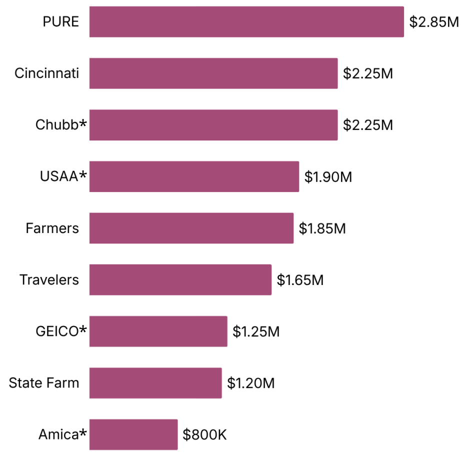
Standard carriers often cap coverage well below what high-value homes need.

As one State Farm customer advised:

"Go with a UHNW carrier, if available"

Median home value(s) by insurance carrier

USD



Auto Insurance

Top 3 spots for auto insurance usage go to mainstream brands, but only GEICO has respectable ratings

Auto insurance carriers among HNW households

Share of those with auto insurance; % who recommend their carrier

Auto insurance carriers	Share with auto insurance	% Recommend
HNW specialty carriers		
Cincinnati	7%	80%
PURE	5%	71%
Standard carriers		
State Farm	19%	54%
GEICO	13%	83%
Progressive	11%	47%
USAA*	4%	100%
Travelers*	4%	60%
Farmers*	4%	100%
Amica*	4%	80%

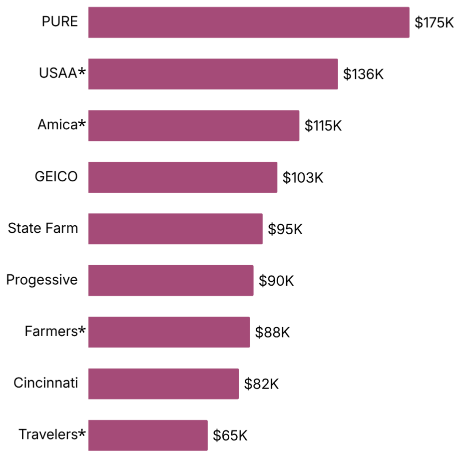
Unlike home insurance, specialty carriers show less of an advantage over standard ones for auto, making home the primary consideration for bundling.

Drivers with the highest valued vehicle(s) go with PURE

Rate-shopping is a common consideration among respondents across the full range of vehicle values, from $38K to $180K.

Median vehicle value(s) by insurance carrier

USD



Umbrella Insurance

Specialty carriers are the more predictable choice for quality

Umbrella insurance carriers among HNW households

Share of those with umbrella insurance; % of those who recommend their carrier

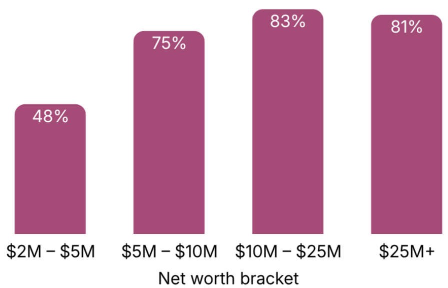
Umbrella insurance carriers	Share with umbrella insurance	% Recommend
HNW specialty carriers		
Cincinnati	9%	78%
Chubb	9%	70%
PURE	6%	83%
Standard carriers		
State Farm	16%	44%
RLI	7%	100%
USAA	7%	71%
GEICO	6%	33%
Erie*	5%	80%
Amica*	5%	60%

Cincinnati, Chubb, and PURE all have decent recommend rates. Standard carriers are a coin flip: RLI earns a 100% (on a smaller base), while State Farm and GEICO miss on expectations.

Umbrella insurance is standard beyond $5M net worth, though coverage as a share of assets shrinks as wealth grows

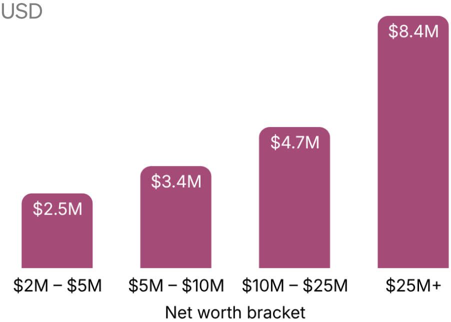
Umbrella insurance uptake by net worth brackets

% of respondents



Median umbrella coverage amounts by net worth bracket

USD

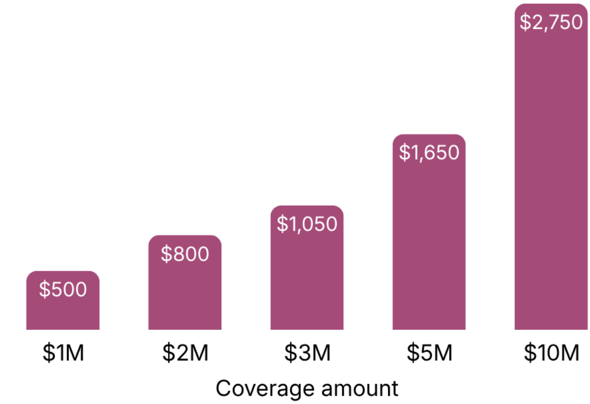


Adoption levels off after $10M in wealth, meaning 1 in 5 with $25M+ don't have umbrella insurance.

Umbrella premiums get cheaper per $1M insured at higher coverage levels

Median umbrella annual premiums by coverage amount

USD



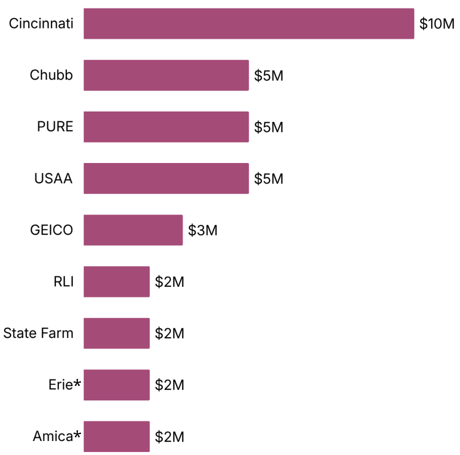
Umbrella insurance gets cheaper per dollar at higher limits. The $10M tier costs about half as much per $1M as the $1M tier.

But rates are climbing: one State Farm customer reported a 120% premium increase over three years.

HNW specialty carriers offer the highest coverage, but can cost 2X+ more for the same protection than standard options

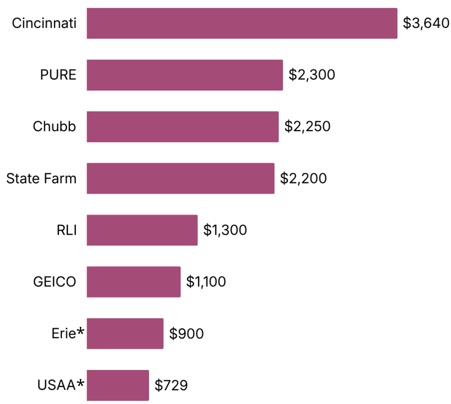
Median umbrella coverage by carrier

USD



Median umbrella annual premiums for $5M coverage

USD



HNW umbrella carriers aren't always the priciest. One respondent who purchased via Long Angle's partnership shared: *"Was 1/3 the price of my other most recent renewal quote!"*

Insurance Brokers

No one insurance broker dominates the market, 5 / 5 recommend Pine View

Insurance brokers among HNW households

of respondents recommending per using each broker

Insurance brokers	Recommend / Using
Pine View[1]*	5 / 5
Marsh McLennan*	2 / 2
AJG*	1 / 3

1 Pine View is a Long Angle partner

42 respondents named 35 different brokers. The table shows only those listed by multiple respondents.

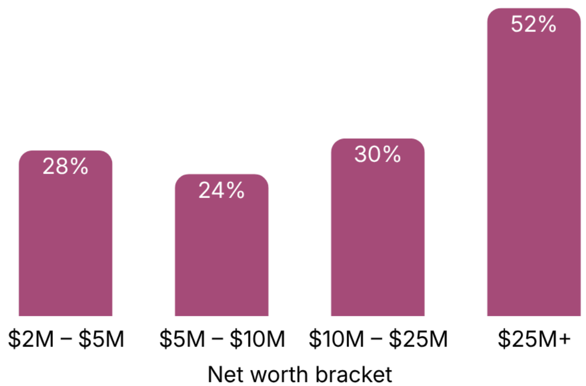
30% have used an insurance broker, adoption is much more prevalent for the ultra-wealthy

Respondents mention access to higher coverage limits and carriers "not available direct" as key reasons to use a broker.

Brokers also provide access to guaranteed replacement cost, agreed value for assets, and concierge-level claims.

Insurance broker usage by net worth bracket

% of respondents



9 out of 10 who use brokers triple-bundle

89% who've used a broker have done so for home, auto, and umbrella combined

Life Insurance

No winners among life insurance carriers for market share or satisfaction

Life insurance carriers among HNW households

Share of those with life insurance; % who recommend their carrier

Life insurance carriers	Share with life insurance	% Recommend
Northwestern Mutual*	8%	20%
Prudential*	8%	60%
Lincoln Financial*	6%	67%
MetLife*	6%	25%
Principal Financial*	6%	67%
Other	66%	52%

Frustrations with carriers shared by respondents include slow processes, outdated technology and communication, and unhelpful agents.

Only half of those with life insurance recommend their carrier, more than a third are unsure

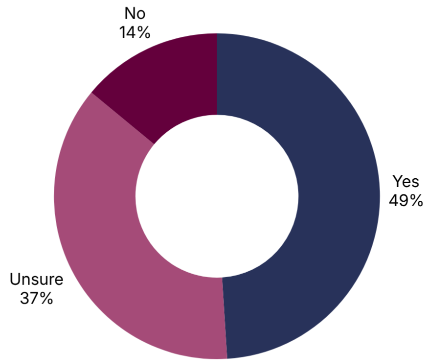
For life insurance, the product itself may be the bigger issue. Several respondents said they regretted the purchase, particularly whole life.

As one Northwestern Mutual customer put it:

"Term life is fine, but I won't renew when it expires.
Whole life is terrible. Regret the purchase."

Likelihood to recommend life insurance carriers

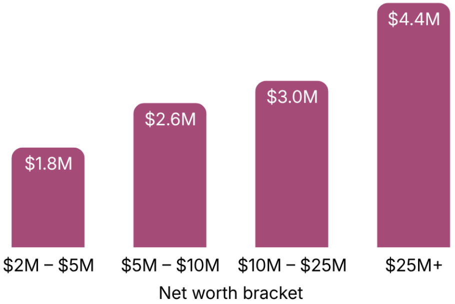
% of respondents with life insurance



Life insurance coverage rises with wealth, but at smaller ratios to net worth

Median life insurance coverage by net worth bracket

USD



Note: Includes respondents with multiple policies.

Coverage amounts typically fall in $1M increments, so the median figures land between round number marks.

Absolute coverage barely changes between $5M–$10M and $10M–$25M despite the second bracket being 3X wider.

Term life is the predominant life insurance policy

85% who have life insurance have term life

14% have whole life

10% have universal life

Note: Percentages do not add up to 100% due to some respondents holding multiple policies. Universal life includes IUL, VUL, PPLI, and traditional universal life

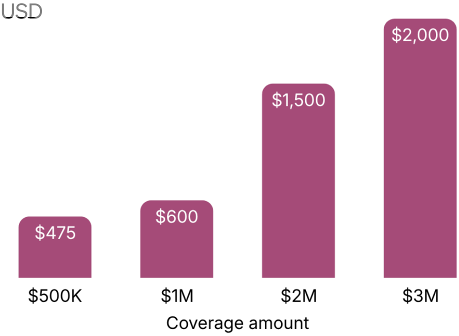
A simple term life premium benchmark: below 0.1% of coverage

Annual premiums typically fall well below $1,000 per $1M in coverage.

Respondents with $4M–$13M in coverage report premiums of $2K–$10K a year, mostly under that 0.1% threshold.

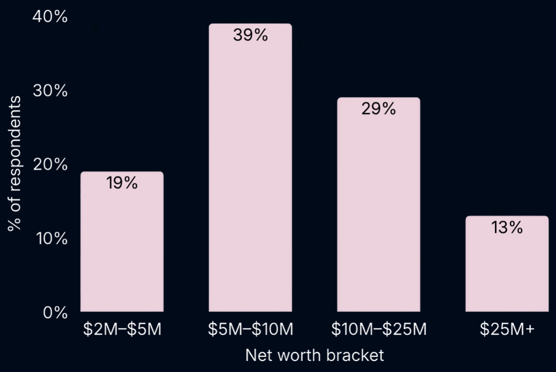
Median term life annual premiums by coverage amounts

USD



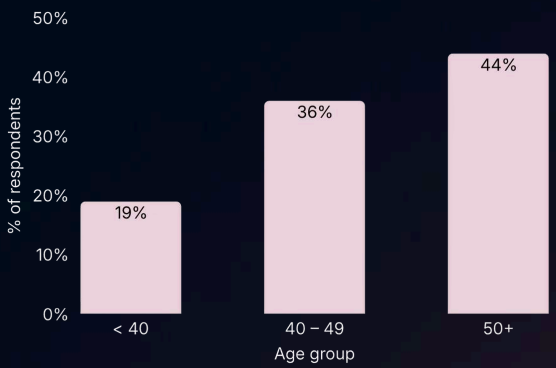
Respondent Demographics

Respondents by Net Worth Bracket



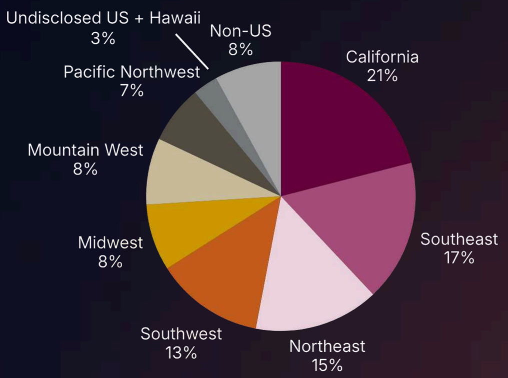
The sample consists entirely of high-net-worth individuals, with 81% reporting a net worth above $5M. The largest cohort (39%) falls between $5M and $10M, while 42% of respondents exceed $10M in net worth.

Respondents by Age Group



Respondents span a range of career stages, split roughly evenly between those under 50 (55%) and 50 or older (44%). This balance brings perspectives from both still-working professionals and more established high-net-worth households.

Respondents by Region



The sample is predominantly based in the United States, representing 92% of all respondents. California is the most represented state, accounting for 21% of the total survey population.

About

Long Angle

Long Angle is a private, vetted community for highly successful young entrepreneurs, executives, and investors. Our **9,000+ members**, primarily self-made 30–55-year-olds with portfolios ranging from $5 to $100 million, rely on Long Angle as a confidential, unbiased resource for knowledge sharing, relationship building, and accessing private markets.

Highly Engaged Online Community
Our thriving online platform fosters meaningful discussions on topics including wealth management, tax planning, entrepreneurship, travel, and personal development.

Alternative Investments
Long Angle facilitates institutional-grade alternative investments, with over $400 million in committed capital across more than 50 Special Purpose Vehicles (SPVs). Members benefit from collective expertise and scale to access and underwrite top-tier alternative assets, including private equity, VC, search funds, private credit, secondaries, and real estate.

Peer Advisory Groups
Through our Trusted Circles peer advisory groups, members build their personal board of directors in intimate groups of 6-8 peers. Monthly meetings offer diverse perspectives on personal challenges, investing, and life transitions, customized to life stages and net worth.

Curated Events and Education
Long Angle provides access to high-net-worth events and educational resources. From regional in-person meetups to virtual workshops led by peer members, our programming is tailored to help individuals navigate investment goals and make informed decisions.

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