



# The Equality Economy

## **GROWING YOUR BUSINESS WITH LGBTQ INVESTORS MEANS UNDERSTANDING THEIR NEEDS AND THEIR COMMUNITY.**

As the LGBTQ community grows, so does the number of investors who are members. Steps financial professionals can take to meet the community's specific investment needs and financial goals include proactively offering support and demonstrating that you understand the cultural and legal ramifications of their lives.

### **THIS PROGRAM PROVIDES:**

- A foundation, based on proprietary research, to help you communicate with LGBTQ investors and families.
- A step-by-step process to help you identify the LGBTQ community in your area and ally yourself with this community.
- An LGBTQ investor seminar in a box. Everything you need—from invites to follow-up.

# \$917 billion

The estimated buying power of the LGBTQ community, which represents 4.1% of the total population.<sup>1,2</sup>

# 80%

The percentage of LGBTQ investors who prefer to work with firms that support the LGBTQ community.<sup>3</sup>

### **MATERIALS: FOR FINANCIAL PROFESSIONALS**



#### **White paper:**

- Helps you understand the financial and social aspects of the LGBTQ community, based on proprietary T. Rowe Price research.
- Provides insights to connect with the LGBTQ community.



#### **Playbook**

- Helps you identify LGBTQ groups in your community and guides you on how best to authentically connect with them.



#### **Opportunity Size Tool**

- A heat map that breaks out key LGBTQ economic and demographic statistics, including incomes, by region.
- Helps you understand the size and location of the community to better pinpoint opportunities in your area.

<sup>1</sup> "America's LGBT Economy," National LGBT Chamber of Commerce, 2016.

<sup>2</sup> Gates, Gary J., "In U.S., More Adults Identifying as LGBT," Gallup, January 11, 2017.

<sup>3</sup> Based on online survey of 1,300 adults aged 21 and over who identified as LGBTQ, conducted by T. Rowe Price through Community Marketing & Insights (CMI) in October 2016.



## MATERIALS: FOR USE WITH INDIVIDUAL INVESTORS



### Conversation Starter:

- Helps you identify concerns of the LGBTQ community on working with financial institutions and financial professionals.



### Seminar in a Box

- A turnkey 30-minute presentation—complete with speaker notes—for use with LGBTQ investors in your region.
- Helps you gather information and establish relationships via sign-in sheets and evaluation forms.

## Legal Approval Level

These materials have been approved at the individual investor level.

## To Learn More

Contact your regional sales consultant, call **800-564-6958** or email **AdvisorServices@troweprice.com**; or visit **troweprice.com/equalityeconomy**.

### INVEST WITH CONFIDENCE.®

This is part of the T. Rowe Price Client Loyalty program, which has been designed to provide financial professionals with the tools they need to make connections and build relationships with investors in the LGBTQ community.