

## 2012 SYNDICATED RESEARCH AGENDA

Cogent Research® is dedicated to providing clients with custom quality research in a syndicated package. We are pleased to announce the 2012 syndicated research agenda with some new additions to help clients further understand and take advantage of market opportunities.

### PERSPECTIVE SERIES™

#### RETAIL BRANDSCAPE™ REPORTS

**Understand what drives product and brand selection:** Cogent offers the most comprehensive evaluation of the advisor and investor landscapes, pinpointing awareness, perceptions, usage, share of wallet, and loyalty towards investment distributors, mutual fund managers, and ETF and VA providers. These studies track changes in attitudes, behavior, and product usage over a five-year period.

##### Investor Brandscape®

4,000 investors with investable assets of \$100,000 or more, segmented by assets (with nearly 1,000 millionaires).

Topics include:

- *Investment Mindset*
- *Asset Allocation and Product Mix*
- *Relationship with Advisor*
- *Brand Equity and Momentum*
- *Client Experience/Satisfaction*
- *Retirement and Investment Trends*

**Investment: \$30,000 / October 2012**

##### Advisor Brandscape®

Multi-channel study of 1,700 advisors across wirehouse, regional, bank, independent, and RIA channels.

Topics include:

- *Current and Future Product Usage*
- *Product Allocation*
- *Brand Equity and Momentum*
- *Advisor Brand Experience*
- *Advisor Brand Commitment*
- *Advisor Practice Trends*

**Investment: \$30,000 / June 2012**

##### Institutional Investor Brandscape™

This third annual study looks at the behaviors and attitudes of investment decision makers within defined benefit pension plans, foundations, and endowments. The report covers trends in investment strategies and implementation, and explores the selection process U.S. institutional investors use for choosing asset managers and consultants. The report provides a detailed assessment of current asset managers, including critical brand and loyalty metrics, such as consideration by asset class and satisfaction on a battery of attributes.

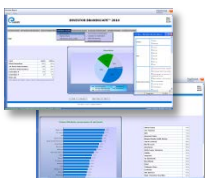
**Investment: \$30,000 / December 2012**

##### The Retirement Planscape®

This third annual survey of over 1,600 plan sponsors examines trends in plan design, usage of intermediaries, and awareness, perceptions, satisfaction, and loyalty to retirement plan providers and investment managers in the defined contribution space.

**Investment: \$30,000 / May 2012**

### ONLINE REPORTAL TOOLS



#### Get full access to our data from each perspective report

- *Perform customized analysis and reporting*
- *See all survey respondents*
- *Filter analysis to focus on key target groups or brands*
- *Access the data 24 hours a day, 7 days a week*

**Investment: \$10,000 per report**

Cogent Research®  
125 CambridgePark Drive  
Cambridge, MA 02140  
PH 617-441-9944  
FX 617-441-9966

www.cogentresearch.com  
info@cogentresearch.com



## DISCOVERY SERIES™

### INVESTOR-BASED REPORTS

#### Rollover Assets in Motion™

This annual report examines affluent investors' retirement preparations in the current market and the steps they are taking to secure their financial future. It explores plan asset flows, specifically those financial services firms best positioned to capture rollover assets and the reasons behind investors' brand preferences (includes 4 year trending analysis).

**Investment: \$7,500 / December 2012**

### ADVISOR-BASED REPORTS

#### Retirement Plan Advisor Trends™

This second annual report examines the trends in perceptions, attitudes, and usage of defined contribution plan providers and investment managers among advisors. The report includes an in-depth look at the unique needs of the retirement plan advisor and the attributes most likely to influence their recommendations to plan sponsors.

**Investment: \$15,000 / September 2012**

#### Advisor Touchpoints™

This report looks at the trends in preferred method and frequency of contact desired by financial advisors. It evaluates the performance of leading brands across various communications vehicles, advisors' interaction with digital media and mobile technology, how mobile technology is being used to both gather market information and service clients, and how social media is impacting advisors' marketing strategies and engagement with other financial professionals and product providers.

**Investment: \$9,500 / July 2012**

### ADVISOR & INVESTOR-BASED REPORT

#### The Evolution of the Annuity Industry™

This second annual report, co-developed and with the Insured Retirement Institute (IRI), examines the current usage and perceptions of annuities through the lens of financial advisors and investors. It explores trends, product development and distribution strategies to drive the future growth of the annuity industry and increase adoption among annuity users and non-users.

**Investment: \$7,500 / September 2012**

#### The Active Trader™ **NEW**

This study profiles and explores the attitudes towards investing and providers from the perspective of the self-directed investor. It investigates which services and tools are desirable and which providers are the best at meeting investor trading needs. In addition to customer experience, key brand perceptions will be measured for both leading providers and their affiliated active trader platforms.

**Investment: \$7,500 / January 2012**

#### Advisor In-Retirement Income™ **NEW**

This report explores advisor attitudes and perceptions towards pre-retirees and retirees, as well as current portfolio strategies and the appetite for specific retirement solutions. The report reviews competitors and opportunities to increase interest in retirement income products.

**Investment: \$9,500 / November 2012**

#### Alternative Investment Trends™

This second annual report explores trends in financial advisor usage and attitudes toward alternative investment products and strategies. It identifies preferred alternative solutions, barriers to usage, and the strategic role in client portfolios. It also measures awareness and perceptions of alternative investment product providers.

**Investment: \$9,500 / July 2012**

#### Advisor Channel Migration Trends™ **NEW**

This report examines the attitudes of advisors who are likely to move to a new firm in the next two years. It identifies the most important factors motivating advisors to change firms, as well as their awareness and impression of potential new employers. This report also measures perceptions of custodian service providers among advisors interested in the RIA channel.

**Investment: \$9,500 / August 2012**

### INSTITUTIONAL-BASED REPORT

#### DC Investment Manager Brandscape™

Gain insight into the needs of the plan sponsor with the DC Investment Manager Brandscape™ 2012 report. Over 1,600 plan sponsors rate the 36 DCIO providers in terms of awareness, perception, satisfaction, and loyalty.

**Investment: \$20,000 / May 2012**

## COGENT FOCUS INSIGHT SERIES™ **NEW**

Multi-client qualitative research to explore emerging issues and broad challenges facing the companies and organizations we serve.

Collaborate with peers in the industry through a Cogent Focus Insight Series (CFI)™ initiative and receive best-in-class research at a fraction of the cost associated with an individual custom engagement.

Topics for 2012 include:

- **Emerging Trends in Alternative Investments™** – How and why are advisors expanding the use of alternative products? How are alternatives being used and which products and providers are likely to gain in this emerging asset class?  
*March 2012*
- **Ready for Retirement™** – How prepared are pre-retirees for retirement? What are their biggest fears and how do they plan to fund any gaps in retirement? Which health and wealth products are likely to benefit as more and more investors enter their golden years?  
*June 2012*
- **Mutual Fund Trends & Distribution™** – Despite challenges from competitor products, mutual fund providers continue to attract assets. However, how will use of funds change in light of new market environments, need for more risk management, and downside risk protection? What can fund providers do to promote continued and increased usage of mutual funds?  
*October 2012*

*Additional topics will be announced*

**Investment: \$25,000 per report\***

*\*Minimum number of participants required*

## SUBSCRIPTION & LICENSING

Please [contact us](#) for more information about:

- Bundled subscription pricing, multi-year subscription discounts, custom oversamples
- Licensing and distribution
- Private label, co-branding, and sponsorship

## ABOUT COGENT RESEARCH

### SYNDICATED RESEARCH

**The most up-to-date, comprehensive understanding of emerging issues and trends lets us continuously generate insight and action strategies for clients. Products include research briefs, syndicated reports, and sponsored papers.**

### CUSTOM RESEARCH

Our custom research produces “actionable insights” that inspire decisions and drive behavior. Solutions include customer loyalty, brand assessment and tracking, product development, and customer acquisition and retention modeling.

### EVIDENCE-BASED CONSULTING

Our proprietary data assets combined with client-supplied information and primary research produce powerful insights and recommendations toward product, trend, and client experience. The result is significantly improved bottom-line performance.

Cogent Research  
125 CambridgePark Drive  
Cambridge, MA 02140  
PH 617-441-9944  
FX 617-441-9966

[www.cogentresearch.com](http://www.cogentresearch.com)  
[info@cogentresearch.com](mailto:info@cogentresearch.com)

