Perspective Series

SYNDICATED RESEARCH

# 2009 Advisor Brandscape™

Cogent Research's *Advisor Brandscape™* is the most up-to-date and comprehensive, quantitative examination of advisors across all major distribution channels and provides critical insights into the current and future advisor-sold product mix. The report also explores preferences and trends within specific product categories, and includes detailed assessments of individual providers.

ADVISOR ASSESSMENT OF:

- Open-end Mutual Funds
- Closed-end Funds
- Exchange Traded Funds
- SMAs
- Variable Annuities
- Fixed Annuities
- Hedge Funds

IN-DEPTH PROFILE OF ADVISORS BY:

- Distribution Channel
- Product Usage
- Tenure at Current Firm
- Number of Years in Industry
- Assets Under Management
- Compensation Structure
- Client Age and Affluence

## 2009 ADVISOR BRANDSCAPE™ WILL HELP EXECUTIVES:

### CREATE THE RIGHT PRODUCT PIPELINE

Cogent's market projections of products in the growth and decline phases ensure you know where to focus your product pipeline.

### OPTIMIZE YOUR DISTRIBUTION STRATEGY

Cogent's advisor profiles ensure you understand the specific types of advisors that sell more (or less) of specific products and brands.

### PINPOINT YOUR BRAND POSITIONING

Cogent's brand equity score measures your ranking relative to other top investment providers.

### LEVERAGE DRIVERS OF ADVISOR LOYALTY

Gain an understanding of what drives advisor loyalty to ensure you have the perspective necessary to optimize your position.

## METHODOLOGY:

An online survey of a nationally representative sample of over 1,500 registered financial advisors from the following distribution channels:

- RIAs
- National wirehouse brokers
- Regional brokers
- Independent planners
- Bank representatives

Study fielded in March 2009. Report Q2 '09.



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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.

► SYNDICATED RESEARCH

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

Evidence-based Consulting

Our own proprietary data assts combine with client supplied information and primary research to produce powerful insights and recommendations toward product, trend, and client experience. The result—significantly improved bottom line performance.

COGENT RESEARCH

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# 2009 Advisor Brandscape™

continued

## INSIDE THE REPORT:

### Financial Advisors' Current and Future Product Mix Plus Impact of Industry Trends on Usage and Allocation

- What product classes are growing/shrinking and by how much
- How much do advisors allocate to actively-managed vs. passively-managed products
- Differences in product dynamics by channel
- What are advisors' attitudes towards growing their book of business and how they use and integrate provider data, materials, and wholesalers into their practice

### Brand/Product Specific Insight

- Brand awareness, advertising awareness, and brand consideration
- Brand familiarity and impression scores
- Brand loyalty
- Share of market, share of book of business at product level
- Ratings on advisor experience including short-, mid-, and long-term performance, wholesaler support, problem resolution, fees and expenses, financial stability, reputation, etc.
- Imagery/personality associations with major brands
- Overall CoRe Score™ to determine brand strength and momentum
- Differences in product dynamics by channel

### Preferred Advisor Touchpoints

- Ideal vs. current levels of touchpoints with providers with respect to emails, mail, wholesaler visits, internal sales calls, webinars, etc.
- Most effective means of communication for various types of provider communication
- Best-in-class providers of company, product, and service communications

## RESEARCH INVESTMENT & DELIVERABLES

### U.S. $20,000

Subscription pricing and private label opportunities available across all product categories.

### DELIVERABLES:

- In-depth report: featuring strategic analysis of survey questions, detailed summary of findings, and specific implications for individual investment providers.
- On-site client strategy session
- Custom data cuts tailored to specific client needs

To order this report, or for additional information, please contact:

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