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Assets in Motion:

The Rollover IRA & Retirement Income Market Opportunity

More than 30% of affluent investors currently have assets in an employer-sponsored retirement plan (ESRP) with a former employer. Providers seeking to capture these assets must not only understand investors' rollover intentions, but also the existing relationships and impressions they have of financial services brands. Cogent Research's *Assets in Motion* report will identify the size of the opportunity and translate the implications in terms of investors' projections for cross-over and new business opportunities.

THIS REPORT WILL HELP EXECUTIVES:

- Understand competitive positioning
- Enhance segmentation strategy
- Improve marketing and communications
- Increase market share
- Boost revenue potential

DELIVERABLES:

Detailed report including a summary of findings and implications for investment providers.

RESEARCH INVESTMENT:

U.S. \$7,500

Subscription pricing available across all product categories

INSIDE THE REPORT:

ESRP USAGE AND ROLLOVER PROJECTIONS

- The firms where affluent investors currently hold their ESRP and brokerage accounts
- Percent of assets held in former ESRP
- Crossover analysis (i.e., those who have ESRPs (current and/or former) and brokerage accounts with same provider)
- Likelihood of rolling over assets in former ESRP into a Rollover IRA in the next 12 months
- The firm with which they intend to open the Rollover IRA
- Current "crossover" firms' likelihood of capturing former ESRP/Rollover assets
- Demographic investor profile of those likely to rollover former ESRP assets
- Investment product profile of those likely to rollover former ESRP assets

RETIREMENT INCOME PREPAREDNESS

- Retirement preparedness evaluation
- Risk tolerance

AFFLUENT INVESTOR PROFILE

- Provider relationships
- Advisor usage
- Investment product ownership & asset allocation

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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 assets 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.

