

Based upon Cogent's in-depth quantitative and qualitative research, these white papers offer detailed analysis and discussion of the needs, preferences, and product usage of investors and advisors.

The Female Equation: Influencing Household Investment Decisions

Investment marketing aimed at men misses the mark for the majority of households where females either make or share responsibility for financial decisions. Women have unique investing priorities and preferences and will eventually outnumber men and control the majority of retirement assets. Ultimately, women will invest with advisors and distributors who understand and appeal to their mindset.

The Variable Annuity Conundrum

Retiring Boomers will need to preserve capital, stay invested, and create guaranteed income streams. Variable annuities should be perfectly positioned for historic growth. So why are advisors forecasting flat allocations and so many investors indifferent to the product?

More Than Equal: The High Performing Female Advisor

Males still dominate the ranks, but the stereotype of the successful advisor is as out of date as ticker tape. High performing women are raising the bar across genders without needing to appeal to male investors.

Mind of the RIA

Registered Investment Advisors (RIAs) are different, and not just because they manage more money. This advisor channel is growing rapidly and is resistant to traditional product marketing methods. What's more, product usage and preferences are changing as the RIA designation becomes the preferred choice for more and more advisors.

Social Media and Investing

Blogs, wikis, and social networks (a.k.a. social media) are changing how, why, and when investors make financial decisions. No longer for Gen Xers alone, affluent investors of all ages are taking to social media in droves. This report is the ultimate primer for executives who need to understand how social media technologies are changing the landscape and impacting their firms' bottom lines

Cogent Research

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

www.cogentresearch.com
info@cogentresearch.com



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Cambridge, MA 02140
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FX: 617-441-9966
www.cogentresearch.com
info@cogentresearch.com