

## Retirement Income Dilemma Report

Cogent Research's report will provide insights into current advisor and investor attitudes and behaviors concerning retirement income, focusing on unmet needs and preferences for potential new solutions.

### DELIVERABLES

- A presentation-style report containing a detailed summary of findings from all sessions, including both advisors and investors, in addition to video highlights of all groups.
- Findings to include subgroup analysis by advisor channel and key investor demographics.

### ISSUES ADDRESSED

#### The Retirement Income Landscape

##### The Investor Perspective

- Retirement preparedness and planning
- Attitudes towards advisors and financial product providers
- Expectations and concerns regarding retirement and retirement income
- Challenges to adequately planning for retirement income

##### The Advisor Perspective

- Processes used for retirement planning and retirement income planning
- Attitudes towards and concerns regarding retirement income planning
- Challenges to properly assisting and managing their clients' retirement income
- Planning tools, best practices, and product usage
- Impact of retirement income wave on advisory practices

##### Product Solutions

- Awareness and perceptions of retirement income solutions
- Unmet needs and product usage
- Identifying and targeting key targets for retirement income solutions

	BOSTON, MA	GROUP COMPOSITION
<b>Advisors</b>	<b>Group 1:</b> Regional/Independent Advisors  <b>Group 2:</b> Bank-affiliated Advisors	<b>Group 3:</b> National Wirehouse Advisors  <b>Group 4:</b> Registered Investment Advisors
<b>Investors</b>	<b>Group 1:</b> Investors with \$250K – <\$1M investable assets and within 5 years of retirement  <b>Group 2:</b> Investors with \$250K – <\$1M investable assets and within 5-10 years of retirement	<b>Group 3:</b> Investors with \$1M+ investable assets and within 5 years of retirement  <b>Group 4:</b> Investors with \$1M+ investable assets and within 5-10 years of retirement

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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 continuously generate insight and action strategies for clients. Products and services include white papers, 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 is significantly improved bottom-line performance.



# Subscription Agreement Retirement Income Dilemma Report™

## DELIVERABLES:

- A detailed report containing a summary of findings and video highlights.
- Findings to include subgroup analysis by advisor channel and key investor demographics.

## COST & BILLING PROCEDURE:

- **Cost:** \$9,500 – Syndicated Focus Group Report and Video Highlights.
- **Billing:** Cogent requires payment within 30 days of the invoice date.

## TERMS OF USE OF DATA AND REPORT:

- At no time is the entire report, or substantial portions thereof, to be distributed to parties outside of the subscriber's business unit.
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*By signing below, I agree to the terms in this Subscription Agreement and agree to pay the fee denoted above.*

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