

In-Retirement Income™: 2011

The Mindset and Shifting Strategies of the Growing Retiree Population

This report provides the insights necessary to develop market positioning for retirement-income products. It explores pre-retirees and retirees' current strategies, confidence levels, as well as awareness of and appetite for retirement income solutions.

Investor Retirement Preparedness

- Current and planned retirement income strategies
- Types of accounts and investment products owned
- Overall investor confidence level

General Awareness & Interest in Retirement Income

- Familiarity with and interest in specific retirement income products
- Profile of investors interested in retirement income solutions

Obstacles to Ownership of Retirement Income Products

- Analysis of investors' mindset and approach towards retirement, including whether they have concrete plans to generate retirement income
- Investors' monthly retirement-income projections vs. realities
- Perceptions of retirement-income products vs. strategies
- Missed opportunities by advisors

Opportunities to Increase Interest in Retirement Income Products

- Insights on pre-retirees' and retirees' anxieties toward generating in-retirement income
- Ranking of distinct retirement-income product objectives (i.e., ensuring you won't run out of money)

Competitive Positioning

- Investors' awareness of specific retirement income providers
- Firms that have the majority of investors' retirement savings
- Type of company best suited to offer an in-retirement income product

Methodology Data was collected via a web-based survey of a representative sample of more than 700 affluent retirees and pre-retirees, aged 55 or older, with a minimum of \$100,000 in investable assets. Data was collected in March 2011.

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

Research Investment: \$7,500

To order report or for more information:

E-mail info@cogentresearch.com or call 617-715-7641

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

www.cogentresearch.com
info@cogentresearch.com



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