

INVESTOR ROLLOVER ASSETS IN MOTION™: 2010

The Rollover IRA Market Opportunity

A quarter 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 crossover and new business opportunities.

INSIDE THE REPORT:

USAGE OF ESRPs AND IRAs

- How many affluent investors are using Employer-Sponsored Retirement Plans (ESRPs) and IRAs?
- What proportion of assets are allocated to ESRPs and IRAs?
- How does usage of ESRPs and IRAs vary by assets, generation, and other demographics?
- How has usage of ESRPs and IRAs changed over the past year?

THIS REPORT WILL HELP EXECUTIVES:

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

THE ROLLOVER OPPORTUNITY

- How many investors have assets in former employer plans?
- How likely are investors to rollover assets to an IRA?
- What is the profile of those investors most likely to rollover assets?
- Which firms are best positioned to capture rollover assets and why?
- Which firms will benefit from "crossover" clients – and which stand to lose ESRP assets to competitors' Rollover IRA products?
- What is the product profile of those likely to rollover former ESRP assets?

RETIREMENT INCOME PREPAREDNESS

- What steps have investors taken to prepare for retirement?
- What are investors perceptions of the retirement planning services and solutions of top firms?

DELIVERABLES:

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

RESEARCH INVESTMENT:
\$7,500 USD

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