

In-Retirement Income™: 2010

Building Loyalty Among the Growing Retiree Population

As more of the nation's baby boomers make the leap into retirement, it becomes critical for financial services firms to position themselves as trusted guides in the retirement space. Cogent Research's In-Retirement Income™ provides the necessary insight for establishing retirement leadership by reporting on retirees' and pre-retirees' plans for retirement income, as well as their appetite for retirement income products and evaluation of specific retirement income providers.

Variable annuity – Target payout fund – Fixed index annuity – Bond/CD laddering – More...

Areas of Inquiry

- Attitudes toward retirement income and retirement income planning
- Current and planned retirement income strategies
- Familiarity with and interest in specific retirement income products
- Barriers to usage of retirement income products
- Awareness and impression of specific retirement income product providers

Analysis and Output

- Comparison of opinions and preferences by:
 - Pre-retirees vs. those already retired
 - Advised vs. non-advised retirees/pre-retirees
 - Silent generation vs. 1st and 2nd wave Boomers
 - Level of affluence
- Analysis of retirement income messaging that resonates most with retirees and pre-retirees

What financial services firms are considered best at helping investors manage and invest income in retirement?

Value. In-Retirement Income™ provides important insights on retirees' and pre-retirees' familiarity and interest in retirement income products, as well as the key product features and messages that influence interest most. Findings from the report will enable you to:

- Understand retirees' and pre-retirees' familiarity and impression of your firm as a retirement income provider
- Enhance development of retirement income products the marketplace needs
- Identify the best communication strategies for reaching and building loyalty among retirees and pre-retirees

Methodology. Data was collected via a web-based survey of a representative sample of more than 950 affluent retirees and pre-retirees, aged 55 or older, with a minimum of \$100,000 in assets. Data was collected in December 2009.

Pricing. \$7,500

To order report or for more information:

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

What communication strategy will help ensure that your retirement income products appeal to the market?

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