

ADVISOR ROLLOVER ASSETS IN MOTION™: 2010

Affluent investors now report having more assets in IRAs than in 401(k) plans and as more Boomers begin to retire, this trend will continue to accelerate. Advisor Rollover Assets in Motion™ in an in-depth exploration of the approaches advisors are taking to attract and retain critical rollover assets. The report not only quantifies the value of IRA opportunity assets in real dollars and as a percentage of book, but examines strategies advisors are using to gather effectively rollover assets. Furthermore, the report identifies which providers advisors plan to entrust with rollover assets, and what specific investment products they will use.

INSIDE THE REPORT

This report will help executives:

- Identify and target heavy rollover producers
- Maximize opportunity through alignment of service models to meet advisor needs
- Identify IRA product usage trends
- Pinpoint opportunities and threats posed by specific competitors

Current and Future Rollover activity

- What level of rollover conversion activity have advisor experienced over the past year, and what do they expect in the future?
- What specific actions are advisors taking to encourage or attract rollover activity?

Profiling the Rollover Advisor

- Who and where are the biggest current rollover producers, and where is further growth expected to occur?
- What is the size of the rollover opportunity for service providers in the coming year, and what specifically do rollover advisors look for in a partner?

Provider and Product Preferences

- With which providers do advisors plan to entrust their clients' IRA assets?
- What specific reasons do advisors cite for choosing preferred providers?
- How do advisors envision allocating IRA assets across various investment product options?

METHODOLOGY

Data collected via web-based survey among a representative sample of 400 advisors with an active book of at least \$5 million AUM. Data collection in August 2010.

DELIVERABLES

Detailed PowerPoint style report, including a summary of findings as well as implications for investment product and service providers.

Research Investment: \$9,500 USD

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