

Investor Rollover Assets In Motion™: 2012

The Rollover IRA Market Opportunity

Cogent's Investor Rollover Assets in Motion™ report will provide you with an overview of affluent investors' usage of ESRPs and IRAs, measure distributor and asset management firm opportunities to gain IRA Rollover assets, and analyze the specific steps investors have taken to prepare for retirement.

Inside The Report

Usage of ESRPs AND IRAs

- How are affluent investors using Employer-Sponsored Retirement Plans (ESRPs) and IRAs?
- What proportion of assets is 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?
- Satisfaction with ESRP providers.

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 investor's perceptions of the retirement planning services and solutions of top firms?

Methodology

Data is collected via a web-based survey of a representative sample of more than 4,000 affluent investors, with a minimum of \$100,000 in investable assets (excluding real estate). Data collection is October 2011.

Deliverables

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

Research Investment: \$7,500

This report will help executives

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

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

www.cogentresearch.com
info@cogentresearch.com



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, comprehensive understanding of emerging issues and trends lets us continuously generate insight and action strategies for clients. Products and services include research briefs, syndicated reports, and sponsored papers.

Evidence-based Consulting

Our own proprietary data assets combined 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.

**For more
information contact:**
info@cogentresearch.com
617-441-9944