



cogent syndicated

Cogent Beat[™] Advisor

A new way to discover,
interpret and influence
your marketplace

The rhythm of the marketplace is complex.
Find your own beat.

Cogent Beat Advisor gives you the ability to evaluate your brand, track engagement, benchmark against competitors and even predict future trends—whenever, wherever and however you want. This powerful research tool enhances and integrates with our annual Advisor Brandscape[®] report and helps keep your finger on the pulse of evolving advisor attitudes and behaviors to effectively retain and grow assets. It's a prospective view of the marketplace from the perspectives that matter to you most.

CONTINUOUS

Get the data you need as often as you need through our state-of-the-art technology platform

PERSPECTIVE

See and understand the landscape from both a broad and focused perspective, and select the time frames and subgroups that are most relevant to you

PROSPECTIVE

Track where you are and what's ahead with the most powerful insights about your brand, your competitors and the marketplace

Cogent Beat Advisor Overview

Cogent Beat Advisor addresses and supports the specific needs of multiple user groups within mutual fund and ETF firms.

MARKETING AND BRAND

Track your brand health in the marketplace to maximize acquisition opportunities and minimize attrition

SALES AND DISTRIBUTION

Evaluate the efforts of your wholesaling team, as well as those of your competitors

PRODUCT DEVELOPMENT

Tap into shifting product and asset class preferences at the earliest stages

MARKET RESEARCH

Filter, segment, compare and combine your data at will to meet the needs and interests of your stakeholders

FEATURES

Continuous Data Collection

- Monthly data feeds via the intuitive, easy-to-use Cogent Beat™ portal

Thoughtful Analysis

- Quarterly written brand equity commentaries from Cogent Syndicated analysts
- Annual Advisor Brandscape® report and customized presentation
- Access to team of wealth management analysts

Prospective View

- Anticipated shifts in asset class use
- Future brand consideration

Flexible Online Reporting Tools

- Robust filtering capability to create customized dashboard views (e.g., time frame, AUM, channel, clients vs. prospects, product use)
- On-demand research tools for deeper analysis from the comprehensive dataset
- On-demand, in-depth data analysis tool with ability to export data

SAMPLE SIZE AND METHODOLOGY

- 350–400 advisors per month representing all advisor channels and AUM
 - RIAs
 - National wirehouse brokers
 - Regional brokers
 - Independent planners
 - Bank representatives

SUBSCRIPTION INVESTMENT: \$125,000

- 12-month subscription
- 10-seat license for unlimited online access to client portal
- Monthly data feeds
- Quarterly written brand equity commentaries
- Annual Advisor Brandscape® report
- Annual Advisor Brandscape® presentation
- 15 analyst hours
- Portal training and help desk access

Cogent Syndicated is the most trusted, reliable and agile source for wealth management insights.

We've been inside the industry for over 20 years. Every single day we are talking to your most valuable clients, customers and prospects—they know us and they trust us. Our curated, stable sample of advisors is truly representative of the entire advisor universe. Our team of industry experts distills data to help brands translate human behavior into future products and messages that keep you ahead of transforming market needs.

Talk to us.

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Pinpoint competitive weaknesses to elevate brand, increase market share and benchmark your firm against competitors with our robust suite of advisor research.

COGENT BEAT™ ADVISOR

Monitor current product trends, brand positioning and wholesaler effectiveness

MEDIA CONSUMPTION™ ADVISOR

Track media usage patterns and preferences to inform media buys and maximize advisor reach

RETIREMENT PLAN ADVISOR TRENDS™

Increase DC market share, optimize distribution strategy, and strengthen advisor satisfaction

BRAND METRICS TRACKING

Assess marketplace perceptions of your firm and competitors at any point throughout the year