



cogent syndicated

Investor Brand Builder™

Maximize purchase intent
among investors and
expand client relationships

Publishing October 2021

To attract and retain affluent clients, financial services firms must fully understand their brand perception and loyalty among higher-asset investors, especially those who are “ready-to-act.” This information is critical to strategic decisions regarding targeting, brand engagement and differentiation, boosting consideration and expanding share of wallet.

Investor Brand Builder provides a holistic overview of important trends affecting the affluent investor market and a customized evaluation of your brand health to enhance investor segmentation, improve marketing and communication, identify opportunities to grow market share and boost profitability. You choose the way you want the data cut to align with your firm’s view of the affluent investor population, giving you customized insights that can directly inform your brand and marketing strategies.

NEW THIS YEAR: A section featuring lessons from Behavioral Science, including implications for how to engage investors with a promotion oriented mindset (e.g., achieving positive financial outcomes) versus those with a focus on prevention (e.g., preventing negative financial events).

BOOST PROFITABILITY

Identify the strengths and weaknesses of your brand to adjust strategies, increase investor loyalty, retain assets and attract new clients

IDENTIFY NEW TARGETS

Identify investors who are ready-to-act and develop effective campaigns to get your firm in these investors’ consideration set and increase market share

TRACK COMPETITORS

Benchmark performance against your competitors to improve brand positioning

Investor Brand Builder Overview

AREAS OF INQUIRY

Use of Advice

- Financial advisor relationships vs. online distributor relationships
- Robo-advisor use and satisfaction
- Loyalty with financial advisors

Brand Equity for Leading Distributors and Product Providers

- Unaided consideration and overall awareness
- Brand impression and imagery association
- Overall consideration

Distributor, MF and ETF Provider Brand Use, Satisfaction and Loyalty

- Penetration
- Share of assets
- Loyalty
- Satisfaction with a battery of client experience attributes
- Drivers of client loyalty
- Intent to increase/decrease investments

Affluent Investor Profile

- Account and product use
- “Ready-to-act” investors likely to invest in next three months

- Risk tolerance and active/passive allocation
- Attitudinal battery including trust in the financial community
- Investor touchpoints

Digital Engagement and Investment Accounts

- Use of digital tools
- Satisfaction with digital tools
- Barriers to using digital tools and factors that encourage their use

Deep Dive on Investor Sentiment

- Assessment of current and anticipated US economic conditions
- Evaluation of personal financial situation
- Top investment related concerns and primary post-pandemic financial stressors
- Emotional reaction to current investment environment

Lessons from Behavioral Science

- Implications for engaging investors with a promotion-oriented mindset (e.g., achieving positive financial outcomes) vs. those with a focus on prevention (e.g., preventing negative financial events)

SAMPLE SIZE AND METHODOLOGY

- 4,000+ US adults with investable assets of at least \$100,000
- Web-based survey
- Stratified sample allows for subgroup analysis by assets, age, generation, gender, distribution channel, advisor use and other key variables

PUBLICATION SCHEDULE

- Survey fielded: June–August 2021
- Publication: October 2021
- Strategy session: Starting November 2021

SUBSCRIPTION INVESTMENT: \$35,000

- Printed summary report with key insights on affluent investor market
- Custom strategy session and custom presentation with up to two investor segments that provide a deep understanding of the market opportunities most relevant to your business strategy

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 investors is truly representative of the entire affluent investor 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 investor research.

COGENT BEAT™ INVESTOR

Monitor investor sentiment, product and distributor perceptions and future investing behavior

MEDIA CONSUMPTION™ INVESTOR

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

AD EFFECTIVENESS™

Assess the reach and effectiveness of advertising messaging using our ongoing research with financial advisors and affluent investors

BRAND LIFT™

Prove the impact of advertising on brand perceptions and key performance indicators using our ongoing research with financial advisors and affluent investors

