



cogent syndicated

2023 Research Catalog

Unique, dynamic solutions designed
to meet your evolving needs



Cogent Syndicated's industry expertise and rigorous data collection provides a holistic view of the wealth management industry. We know which metrics matter and how best to measure them against industry benchmarks.

The largest firms in the business are using our data in their strategic planning—you can apply that same knowledge to build your business and your brand for a true competitive advantage.

WE HELP YOU DEFINE THE MARKETPLACE, YOUR PLACE IN IT AND HOW YOU CAN COMPETE

- The perceptions, behaviors and preferences of the decision-makers that matter most
- Key brand elements to maximize consideration and strengthen loyalty
- Where you stand in the competitive set and areas to stand out

WE HELP YOU FIGURE OUT WHAT TO SAY, TO WHOM, AND HOW AND WHERE TO SAY IT

- Message platforms that motivate your clients and prospects
- How to reach high-value audiences in the ways they prefer
- Benchmarking of sales collateral to ensure you demonstrate strength in the areas that matter

Build your business. Build your brand. Contact us at cogent@escalent.co or 888.962.3312.



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NEW THIS YEAR

- **Trends in Alternative Investments**

This new report will explore interest in and use and future potential of alternative investments among affluent investors and financial advisors.

Investment: \$20,000

Publication: January 2023

- **Retirement Plan Advisor Trends Semiannual Refresh**

A refresh of our annual Retirement Plan Advisor Trends report gives subscribers a semiannual look at changes in the retirement marketplace.

Investment: \$35,000 as a standalone, \$60,000 for both waves

Publication: April 2023

- **Sentiment Tracker With Cogent Market Pulse**

Get data and insights monthly on what advisors and affluent investors are feeling about the market, economy and constantly changing investing environment.

Investment: \$24,000 as a standalone, included with Cogent Beat subscriptions

Publication: Monthly

- **Emerging Affluent Investor Quarterly Pulse**

A quarterly read on the attitudes, behaviors and preferences of the emerging affluent investor population.

Investment: \$25,000

Publication: Quarterly

- **Annual Advisor Media Consumption Summary**

An annual review of the media preferences of financial advisors including year-over-year trending detailed by channel, AUM, DC production and product use.

Investment: \$20,000

Publication: February 2023

- **Optimizing Advisor Touchpoints**

We're combining our unparalleled data with the latest scientific analysis and extensive competitive intelligence to help firms fine-tune their advisor communications.

Investment: Contact us

Publication: Ongoing

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Annual Reports

Our annual reports provide a comprehensive, holistic view of the industry. Measure brand awareness, strength and perceptions among multiple audiences, benchmark key areas of growth and get actionable competitive intelligence.

Report	Release	Audience	Investment
Trends in Alternative Investments	Jan 2023	Fin. advisors/Affluent inv.	\$20,000
Media Consumption Advisor Summary	Feb 2023	Financial advisors	\$20,000
US Institutional Investor Brandscape	Mar 2023	Institutional investors	\$45,000
Retirement Planscape®	May 2023	401(k) plan sponsors	\$40,000
Advisor Brandscape®	Jun 2023	Financial advisors	\$45,000
DC Participant Planscape™	Jul 2023	DC plan participants	\$35,000
Retirement Plan Advisor Trends™ + Semiannual Refresh	Oct 2023 Apr 2023	DC advisors	\$35,000 for one \$60,000 for both
Investor Brand Builder™	Oct 2023	Affluent investors	\$35,000
Advisor Use of Model Portfolios & SMAs™	Dec 2023	Financial advisors	\$15,000



Data Portals

Evaluate, track and benchmark your brand against competitors every month. Discover where, when, how and on what devices financial advisors and affluent investors are consuming media and keep your finger on the pulse of the evolving attitudes and behaviors of advisors and affluent investors to effectively grow your business and your brand.



Click the product
names in the tables
below to learn more.

Portal	Release	Audience	Investment
Cogent Beat™ Advisor	Monthly	Financial advisors	\$130,000
Cogent Beat™ Investor	Monthly	Affluent investors	\$120,000
Emerging Affluent Investor Quarterly Pulse	Quarterly	Affluent investors	\$25,000
Media Consumption™ Advisor	Monthly	Financial advisors	\$35,000
Media Consumption™ Investor	Monthly	Affluent investors	\$25,000
Sentiment Tracker & Cogent Market Pulse	Monthly	Fin. advisors/Affluent inv.	\$24,000

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Cogent Syndicated Diagnostics

In addition to our annual and ongoing studies, we provide evidence-based consulting that leverages our unparalleled wealth of data and in-house data scientists. We mine our proprietary data to answer your key business questions, enabling you to set realistic, measurable goals for your organization's marketing, sales and product development efforts.

[LEARN MORE](#)



Insights On-Demand

Leverage our ongoing syndicated research to launch custom, proprietary research at a fraction of the cost. Add your own questions to surveys for research on demand. Test ads and uncover how they impact brand awareness. Measure your audience and test your messaging. Access our audiences to answer your most pressing business questions.

Click on the product button below to learn more.

ADVISOR & INVESTOR
INSIGHTS ON-DEMAND

AD EFFECTIVENESS

BRAND LIFT

Our team of experts produces industry-leading, comprehensive insights that strengthen brands and products by focusing on attitudes, behaviors and the most effective way to influence target audiences.

We deliver actionable insights across your organization, from **marketing, brand & communications** to **sales and distribution**, and even **product development**.

We'll help you build your business and your brand.
Contact us at cogent@escalent.co.

Talk to us.

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Subscription & Licensing

Please contact us at cogent@escalent.co or **888.962.3312** for more information about:

- Bundled subscription pricing, multiyear subscription discounts and custom oversamples
- Licensing and distribution
- Private label, co-branding and sponsorship
- Thought leadership

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About Escalent

Escalent is an award-winning data analytics and advisory firm that helps clients understand human and market behaviors to navigate disruption and business transformation. As catalysts of progress for more than 40 years, our strategies guide the world's leading brands from insights through implementation.

Visit escalent.co to see how we are helping shape the brands that are reshaping the world.

