



cogent syndicated

# 2024 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](mailto:cogent@escalent.co) or 888.962.3312.

## NEW THIS YEAR

We're excited to leverage new parts of our Escalent family and dig deeper into our own capabilities to bring these new solutions to our clients. If you're interested in learning more about any of these new offerings, [send us a note](#).

- **Cogent Syndicated Financial Advisor Community**

We're creating an online community of financial advisors (registered reps and RIAs) for the exclusive benefit of our Cogent Syndicated clients. Procured by Cogent and supported by our colleagues and experts at C Space, this new community offers participating clients deeper qualitative insight, 24/7 access to advisors, speed, and a platform for advisor-centric product and service development.

Through a combination of Cogent-sponsored and client-specific inquiries, our financial advisor community will provide an ongoing stream of valuable insights you can't get anywhere else. But the most compelling benefit is simple: Communities build durable relationships, and relationships are the source of actionable results.

*Publication: Continuous*

- **In-Market Advertising Analysis**

To aid wealth management firms in maximizing advertising ROI, we're introducing a comprehensive continuous scan of advertising themes that correlate with brand health. Escalent's secondary research analysts are conducting ongoing scans of key themes used in advertising by wealth management companies and employing systematic methods of categorizing and benchmarking ad content in terms of context, frequency, sentiments, products, features/benefits, and time last run.

We're tracking trends in online advertising and correlations between advertising themes and brand health. Ultimately, these insights will identify differentiation opportunities for subscribing clients and provide critical input for advertising and media plans.

*Publication: Quarterly*

- **Trajectory of Intergenerational Wealth Transfer**

The largest transfer of wealth in history is believed to have just begun. Over the next 25 years, \$72 trillion in assets is expected to be handed down directly to heirs, with an additional \$12 trillion donated to charities. While many wealth management firms have their eyes on this prize, no one knows when or where these assets will surface. No one, that is, except the future beneficiaries themselves.

Leveraging our ongoing survey of affluent investors, we're gathering data to size the opportunity, forecast future intent (invest versus save versus spend) and identify the types of education and support these future heirs will need. We will publish insights each quarter and create new areas of inquiry based on results and input from subscribing clients.

*Publication: Quarterly*

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## Annual Reports

Measure brand awareness, strength and perceptions among multiple audiences, benchmark key areas of growth and get actionable competitive intelligence.

Report	Release	Audience	Investment
Annual Media Consumption™ Advisor Summary	Feb 2024	Financial advisors	\$25,000
US Institutional Investor Brandscape®	Mar 2024	Institutional investors	\$50,000
Trends in Alternative Investments™	Apr 2024	Advisors/investors	\$25,000
Retirement Planscape®	May 2024	401(k) plan sponsors	\$45,000
Advisor Brandscape®	Jun 2024	Financial advisors	\$50,000
DC Participant Planscape™	Jul 2024	DC plan participants	\$40,000
Retirement Plan Advisor Trends™	Oct 2024	DC advisors	\$40,000
Investor Brand Builder™	Oct 2024	Affluent investors	\$35,000
Advisor Use of Model Portfolios & SMAs™	Nov 2024	Financial advisors	\$25,000



## Data Portals

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.

Portal	Release	Audience	Investment
Cogent Beat™ Advisor	Monthly	Financial advisors	\$135,000
Cogent Beat™ Investor	Monthly	Affluent investors	\$125,000
Media Consumption™ Advisor	Monthly	Financial advisors	\$40,000
Media Consumption™ Investor	Monthly	Affluent investors	\$30,000



## And More

Leverage our ongoing syndicated research to launch custom, proprietary research at a fraction of the cost. Monitor market sentiment of financial advisors and affluent investors monthly.

Product	Availability	Audience	Investment
Advisor Insights On Demand	Monthly	Financial advisors	\$30,000/module
Investor Insights On Demand	Monthly	Affluent investors	\$25,000/module
Cogent Market Pulse Sentiment Tracker	Monthly	Advisors/investors	\$30,000



### 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 buttons 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 the attitudes and behaviors of 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](mailto:cogent@escalent.co).

## Talk to us.

P: +1 734 542 7600  
E: [COGENT@ESCALENT.CO](mailto:COGENT@ESCALENT.CO)  
[ESCALENT.CO](http://ESCALENT.CO)



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## Subscription & Licensing

Please contact us at [cogent@escalent.co](mailto: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](http://escalent.co) to see how we are helping shape the brands that are reshaping the world.

