



cogent syndicated

2025 Research Catalog

Unique, dynamic solutions designed
to meet your evolving needs

NEW THIS YEAR

We're excited to leverage the full capabilities of the Escalent Group 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**.

The Advisor Exchange™ Community

Through the collaborative effort of in-house experts from Cogent Syndicated and C Space, we are creating an online community of financial advisors (registered reps and RIAs) for the exclusive benefit of our clients.

The Advisor Exchange community is a multiclient arrangement that leverages Cogent's long-standing relationships with financial advisors to provide a more economical option than a proprietary community. It offers participating clients deeper qualitative insight, 24/7 access to advisors, speed, and a platform for advisor-centric product and service development. With a combination of Cogent-sponsored and client-specific activities, The Advisor Exchange community will provide an ongoing stream of valuable insights you can't get anywhere else.



Click to learn more

Topics We're Exploring

- **The Asset Manager Selection Journey.** Uncovering the key factors that influence asset manager hiring by institutional investors and consultants and providing a deeper understanding of the decision-making process, identifying key points of influence along the institutional investor journey.
- **The Evolution of Lifetime Retirement Income.** Examining customer needs and solutions provided from multiple perspectives (retail investors, DC plan participants, DC plan sponsors, financial advisors) and identifying key success factors for product and service providers.
- **Maximizing Advertising Effectiveness.** Helping to answer your big questions before you spend big dollars on production and media to maximize your ROI, including effective concept development, creating message testing and refinement, pre- and post-impact measurement and continuous ad tracking.
- **Trajectory of Intergenerational Wealth Transfer.** 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 semi-annually and create new areas of inquiry based on results and input from subscribing clients.

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



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.



Annual Reports

Report	Release	Audience	Investment
Annual Media Consumption™ Advisor Summary	Feb 2025	Financial advisors	\$30,000
US Institutional Investor Brandscape®	Mar 2025	Institutional investors	\$50,000
Trends in Alternative Investments™	Apr 2025	Advisors/investors	\$30,000
Retirement Planscape®	May 2025	401(k) plan sponsors	\$45,000
Advisor Brandscape®	Jun 2025	Financial advisors	\$50,000
DC Participant Planscape™	Jul 2025	DC plan participants	\$40,000
Retirement Plan Advisor Trends™	Oct 2025	DC advisors	\$40,000
Investor Brand Builder™	Oct 2025	Affluent investors	\$40,000



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 inform your media plan and 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	\$50,000
Media Consumption™ Investor	Monthly	Affluent investors	\$40,000



And More

Tap into our online community of advisors for qualitative insights on demand. 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.

Product	Availability	Audience	Investment
The Advisor Exchange	Contact us	Financial advisors	Contact us
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	\$32,000





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.

**Make the most
of your Cogent
Syndicated
subscription.**

ASK US YOUR BUSINESS QUESTIONS

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.

DIG INTO OUR DATA

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.

ENGAGE US WITH YOUR KEY STAKEHOLDERS

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 and communications to sales and distribution, and even product development. We'll help you build your business and your brand.

We do that, too.

As part of Escalent Group, Cogent is so much more than syndicated research.

Your Cogent Syndicated point of contact works seamlessly across a bench of 1,800 experts from around the globe, completing work in 50 languages across 150 countries. All bringing to bear exceptional strategic thinking, expert data analytics, fresh innovation and creative deliverables to help you navigate disruption and grow.

GLOBAL PRIMARY RESEARCH

The need for trusted information to navigate our disrupted world has never been greater. Over the last five years, we've conducted wealth and institutional brand research in 21 countries, working with a network of vetted partners to source our studies. Each partner is carefully selected to fit the need: by market, audience and research mode. All our work relies on the latest techniques from behavioral and marketing sciences to help clients see the world through consumers' eyes—in the moment as they evolve. Through world-class consultants, award-winning tools, and authentic engagement between brands and stakeholders, we translate data into human and market truths to drive organizations forward.

SECONDARY RESEARCH

There's a wealth of insight in the public domain—if you know where to look. And what to do with it. Our secondary (desk) researchers are industry experts with experience in specific geographies and markets. That enables them to reveal not-so-obvious insights, integrate them with your existing sources and synthesize them—nuances and all—as only a human can. What we don't do is hand over a cut-and-paste data dump. Instead, you get a precise deliverable that answers your most complex business questions.

UX RESEARCH

In the minds of your customers, user experience is customer experience. So, the best experiences are created when you design with customers instead of just for them. Our UX experts follow a three-step process—Empathize & Define, Ideate & Design and Launch & Iterate—that spans the entire product development cycle, from understanding needs, motivations and context to creating and optimizing experiences that deliver moments of delight. And our access to industry-specific niche audiences ensures that we deliver the right people for the right job. Every time.

BEHAVIORAL SCIENCE

Most of the time, people have no idea why they do the things they do. Luckily, we have behavioral science to decode what people really think and how they make decisions. Asking the right questions in the right ways and translating what people say into what they mean is critical, but we go a step further. We use BeSci to understand drivers of non-conscious decision-making and then design brand experiences and communications that land. Simply put, we reveal the “whys” that build strategies to nudge people toward a positive and satisfying outcome.

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



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

Talk to us.

P: +1 734 542 7600
E: COGENT@ESCALENT.CO
ESCALENT.CO



About Escalent

Escalent is an award-winning data analytics and advisory firm specializing in industries facing disruption and business transformation. As catalysts of progress for more than 40 years, we accelerate growth by creating a seamless flow between primary, secondary, syndicated, and internal business data, providing consulting and advisory services from insights through implementation. We are 1,800 team members strong, following the acquisition of C Space and Hall & Partners in 2023. Escalent is headquartered in Livonia, Michigan with locations across the US and in Australia, Canada, China, India, Ireland, the Philippines, Singapore, South Africa, UAE and the UK.

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

