cogent syndicated

2021 Research Catalog

Unique, dynamic solutions designed to meet your evolving needs

Cogent Syndicated Experts

Meet our experts—The brains behind the data.

LINDA YORK, SENIOR VICE PRESIDENT

Linda leads the Wealth Management Syndicated Research & Consulting practice. She has over 20 years of experience in financial services spanning responsibilities in finance, marketing and business strategy.
Linda's products: US Institutional Investor Brandscape®

MEREDITH LLOYD RICE, VICE PRESIDENT

Meredith manages our financial advisor syndicated products. She has more than 15 years of experience managing research initiatives in the wealth management industry. Meredith's products: Cogent Beat™ Advisor, Advisor Brand Metrics Tracking, Advisor Brandscape®

DAVID KEEN, SENIOR PRODUCT DIRECTOR

David manages our affluent investor and marketing and media management products. Dave has over 20 years of supplier-side experience, which gives him a unique perspective . David's products: Cogent Beat™ Investor, Investor Brand Metrics Tracking, Investor Brand Builder™, Media Consumption Advisor & Investor, Brand Lift Assessment, Ad Effectiveness

SONIA DAVIS, SENIOR PRODUCT DIRECTOR

Sonia manages our retirement and defined contribution syndicated products. She has managed numerous qualitative and quantitative studies in financial services in her more than 10 years in the industry. Sonia's products: Retirement Planscape®, DC Participant Planscape™, Retirement Plan Advisor Trends™

ERIN MCLAUGHLIN, SENIOR PRODUCT MANAGER

Erin manages our On-Demand offerings and writes select chapters of our annual reports. She is leveraging her Marketing education from Elon University and expanding her industry knowledge to provide creative solutions for our clients. Erin's products: On-Demand Advisor Testing, On-Demand Investor Testing

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

Closed 2020 with New Insights

Uncover the impact of 2020's defining moments on DC plan sponsors, ESG investing and advisors.

REPORT REFRESH: RETIREMENT PLANSCAPE®

The pandemic has made brand trust even more vital in the 401(k) market. Service and support capabilities are more essential as plan sponsors aim to provide financial guidance and assistance to their plan participants. This refresh is an update on the mindset of the DC plan sponsor audience, providing crucial insights for future business planning as the market adjusts to the new reality. ***October 2020***

REPORT REFRESH: ESG 360°™

2020's defining moments—a global pandemic, economic instability, a movement for social justice and a growing political divide—have sparked a renewed focus on ESG investing. Advisors are taking a second look at ESG funds after reports of strong performance. This refresh uncovers how the opinions, attitudes and behaviors of affluent investors and financial advisors have changed regarding ESG investing, allowing asset managers to more effectively position their ESG offerings. ***November 2020***

DEEP DIVE: ADVISOR USE OF MODEL PORTFOLIOS

Advisors have remained confident about the strength of the global economy and optimistic in their outlook for the US markets. But many advisors are adapting to the increased volatility and unpredictability of the investment market in different ways. Many are turning to model portfolios to scale their business and meet the needs of multiple types of clients simultaneously. This increased attention on models is changing the relationship between advisors and asset managers. This report is a deep dive on advisor use of model portfolios, providing crucial insights for future business planning as the market adjusts to the new reality. ***November 2020***

DEEP DIVE: INSTITUTIONAL CONSULTANT PERSPECTIVE

The pandemic has had a significant impact on the professional lives of institutional consultants, changing the way they interact with asset managers and add value for their clients. Through a series of in-depth interviews with these important influencers, we'll uncover the long-lasting trends that will shape the institutional market for years to come. ***November 2020***

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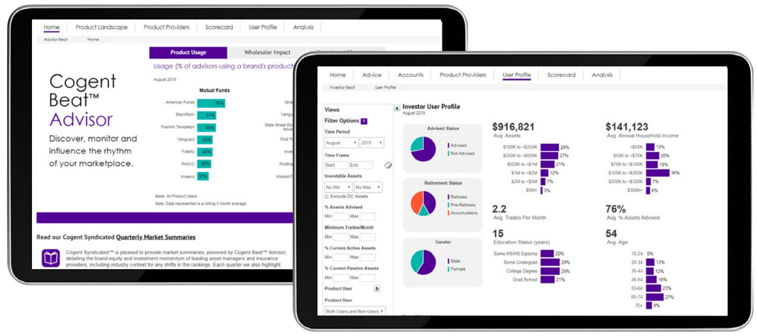
BRAND IMPACT MANAGEMENT SUITE

Cogent Beat™

Evaluate, track and benchmark your brand against competitors and predict future trends—whenever, wherever and however you want. This powerful tool is updated monthly to help you keep your finger on the pulse of the evolving attitudes and behavior of advisors and affluent investors to effectively grow your business and your brand.

FEATURES

- Interactive online portal
- Custom KPIs
- Annual industry Brandscape report
- Three hours of analyst time per quarter
- Quarterly industry commentary
- 12-month subscription
- 10 individual licenses
- Monthly sample size: Advisors (400) and/or investors (1,000 affluent/$1M+)



On-Demand Testing

Get the answers your firm needs quickly and cost-effectively with sophisticated real-time market feedback from financial advisors and/or affluent investors. Our unique access to these valuable audiences gives you a proven and unique platform to get the data you need when you need it. Ask your own proprietary questions using quantitative or qualitative research techniques to better inform your firm's business strategy or determine the true impact of your ad campaigns to more effectively grow your brand and increase purchase intent. We are ready when you are.

DELIVERABLES

- Flexible scheduling
- Targeted fielding based on your specific screening criteria
- Quantitative survey module of up to 10 proprietary questions per month
- Qualitative survey via online bulletin board of up to 30 minutes
- Customized results in an easy-to-read report and/or Beyond the Report podcast

Brand Metrics Tracking

Stay on top of your brand perceptions and monitor your brand equity with a report of key brand metrics for your firm and key competitors among financial advisors and/or affluent investors at any point throughout the year. Track engagement, benchmark against competitors and assess the impact of specific initiatives on your own schedule.

DELIVERABLES

- Flexible scheduling
- Customized presentation with trended analysis and strategic implications

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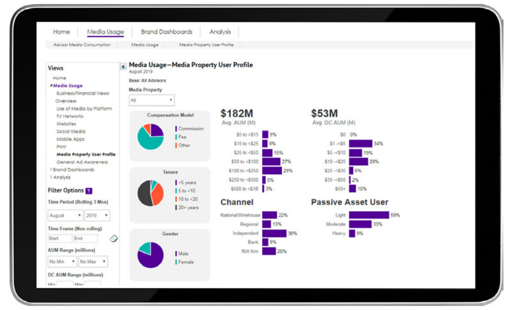
MARKETING & MEDIA MANAGEMENT SUITE

Media Consumption™

Discover where, when, how and on what devices financial advisors and affluent investors are consuming media to inform effective media campaigns and increase advertising ROI. Our continuous Media Consumption research identifies media preferences and the most frequently used properties for business and financial news, enabling subscribers to hone in on specific target audiences with the critical data and insight needed to build effective, multichannel media plans.

FEATURES

- Interactive online portal
- Custom KPIs
- Three hours of analyst time per quarter
- Quarterly industry commentary
- 12-month subscription
- 10 individual licenses
- Monthly sample size: Advisors (400) and/or investors (1,000 affluent/$1M+)



Brand Lift Assessment

Quantify the impact of advertising campaigns on brand perceptions among financial advisors and affluent investors. Our exposed/non-exposed research is designed to examine key brand metric performance during specific campaign periods to provide measurable evidence of the effectiveness of your campaigns in reaching your stated objectives.

DELIVERABLES

- Flexible scheduling
- Custom success metrics/KPIs
- Customized presentation with analysis and strategic implications

Ad Effectiveness

Get real-time market feedback on specific ad executions to optimize campaigns among financial advisors and affluent investors. Identify key messages that resonate with your target audience to maximize your creative ad spend. Quantitative research measures the in-market performance (recall) and impact of creative and messaging via forced exposure within an online survey. Qualitative research enables an in-depth exploration of the campaign elements to pinpoint opportunities for future strategy.

DELIVERABLES

- Flexible scheduling
- Targeted fielding based on your specific screening criteria
- Quantitative survey module of up to 10 proprietary questions per month
- Qualitative survey via online bulletin board
- Customized presentation with analysis and strategic implications

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THE REPORTS: ADVISORS & AFFLUENT INVESTORS

Advisor Brandscape®

Boost profitability, improve competitive positioning, optimize distribution strategy, maximize marketing campaign effectiveness, and increase market share with this annual report. As the most trusted resource for advisor intelligence, Advisor Brandscape provides a holistic view of the advisor landscape including practice models, product use, brand perceptions and user experience across all of the top providers in the mutual fund and ETF categories. In addition, the report includes our popular Advisor Touchpoints section, giving subscribers actionable findings to increase the reach and ROI of their marketing efforts. ***June 2021***

SAMPLE AND DELIVERABLES

- 1,500 financial advisors
- Comprehensive written report with product and brand analysis, commentary and strategic implications
- Custom strategy session and presentation and/or Beyond the Report podcast
- Custom data cuts by senior analysts available

Annuity Brandscape™

Inform startegic decisions, improve competitive positioning and identify unment needs in the annuity marketplace. Annuity Brandscape tracks the attitudes and behaviors of advisors who manage annuities for retail clients as well as the viewpoint of affluent investors themselves. This report provides a holistic view of the annuity landscape including practice models, product usage, brand perceptions and user experience. Combining the perspectives of financial advisors and affluent investors, this report is the leading industry benchmark for the nation's top annuity providers. ***October 2021***

SAMPLE AND DELIVERABLES

- 1,000 affluent investors with a minimum of $100,000 in investable assets
- 400 financial advisors
- Comprehensive written report with product and brand analysis, commentary and strategic implications
- Custom strategy session and presentation and/or Beyond the Report podcast
- Custom data cuts by senior analysts available

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Investor Brand Builder™

Enhance investor segmentation strategy, improve marketing and communication, identify opportunities to enhance market share and boost profitability among your target investor market. This report provides a detailed overview of the investor marketplace, exploring account and product use, advice solutions, perceptions, as well as use of and experience with the leading distributors and mutual fund and ETF providers. Particular attention is given to Ready-to-Act investors, who intend to make an investment purchase in the near future, as well as generational differences between investor age cohorts.

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). ***October 2021***

SAMPLE AND DELIVERABLES

- 4,000+ affluent investors with a minimum of $100,000 in investable assets
- Comprehensive written report with product and brand analysis, commentary and strategic implications
- Custom strategy session and presentation and/or Beyond the Report podcast
- Custom data cuts by senior analysts available

US Institutional Investor Brandscape®

Maximize brand equity, boost acquisition potential and ward off client attrition with this annual view of the institutional market. The report provides a deep-dive into the behaviors and attitudes of senior investment professionals managing DB pensions, endowments and foundations. The report examines trends in asset allocation and investment strategies, the variables that lead to selection, and the current state of brand equity, differentiation and loyalty. ***March 2021***

SAMPLE AND DELIVERABLES

- 400 institutional investors managing at least $100 million in assets
- Comprehensive written report with analysis, commentary and strategic implications
- Institutional Consultant Perspective qualitative report
- Custom strategy session and presentation and/or Beyond the Report podcast
- Custom data cuts by senior analysts available

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DC Participant Planscape™

Boost participant satisfaction, identify new opportunities and refine strategies to maintain DC plan assets and attract new rollover dollars. DC Participant Planscape looks at the participant experience and asks the questions your firm can't ask. The report benchmarks the top plan providers using critical satisfaction measures and examines the attitudes and perceptions that inform participant planning and investing behavior. Insights will arm firms with strategies to maximize participant contributions and engagement levels, optimize the participant experience, leverage cross-sell opportunities and attract rollover dollars. ***July 2021***

SAMPLE AND DELIVERABLES

- 4,600 DC plan participants
- 100+ page report containing industry commentary, charts and graphs
- On-site strategy session and customized presentation

Retirement Plan Advisor Trends™

Grow market share, track key competitors and deepen understanding of DC advisor service and support expectations to strengthen DC advisor loyalty. Retirement Plan Advisor Trends examines the role of advisors across all channels, with a focus on retirement plan specialists managing over $50 million in DC assets. The report benchmarks the leading DC plan providers and DC investment managers on key brand equity and experience metrics to help firms grow market share and strengthen plan advisor loyalty. ***September 2021***

SAMPLE AND DELIVERABLES

- 500 DC plan advisors
- Comprehensive written report with analysis, commentary and strategic implications
- Custom strategy session and presentation and/or Beyond the Report podcast
- Custom data cuts by senior analysts available

Retirement Planscape®

Maximize revenue, measure loyalty and momentum, and identify product and service offerings that address plan sponsor needs. Retirement Planscape assesses the plan sponsor market, identifying competitive strengths and weaknesses in brand, loyalty and key experience metrics. The report explores the aspects leading plan sponsors consider when switching or choosing a new plan provider and examines the use and perceptions of DC investment managers. ***May 2021***

SAMPLE AND DELIVERABLES

- 1,500 401(k) plan sponsors
- Comprehensive written report with analysis, commentary and strategic implications
- Custom strategy session and presentation and/or Beyond the Report podcast
- Custom data cuts by senior analysts available

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2021 RATES & DELIVERABLES

Brand Impact Management Suite

Product	Release	Audience	Fielding Period	Investment
Cogent Beat™ Advisor	Monthly	Financial advisors	Continuous	$125,000
Cogent Beat™ Investor	Monthly	Affluent investors	Continuous	$115,000
On-Demand Testing—Quant	Client-specific	Financial advisors Affluent investors	Contact us for availability	$15,000
Brand Metrics Tracking	Client-specific	Financial advisors Affluent investors	Monthly	$15,000

Marketing and Media Management Suite

Product	Release	Audience	Frequency	Investment
Media Consumption™ Advisor	Monthly	Financial advisors	Continuous	$35,000
Media Consumption™ Investor	Monthly	Affluent investors	Continuous	$25,000
Brand Lift Assessment	Client-specific	Financial advisors Affluent investors	Contact us for scheduling	$20,000
Ad Effectiveness—Quant	Client-specific	Financial advisors Affluent investors	Contact us for scheduling	Contact us for pricing
Ad Effectiveness—Qual	Client-specific	Financial advisors Affluent investors	Contact us for scheduling	Contact us for pricing

The Reports

Product	Release	Audience	Fielding Period	Investment
Advisor Brandscape®	Jun 2021	Financial advisors	Jan–Mar 2021	$45,000
DC Participant Planscape™	Jul 2021	DC plan participants	May 2021	$35,000
Investor Brand Builder™	Oct 2021	Affluent investors	Jul–Aug 2021	$35,000
Retirement Plan Advisor Trends™	Sep 2021	DC advisors	Aug 2021	$35,000
Retirement Planscape®	May 2021	401(k) plan sponsors	Feb–Mar 2021	$40,000
US Institutional Investor Brandscape®	Feb 2021	Institutional investors	Oct–Nov 2020	$40,000

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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

Talk to us.

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About Escalent

Escalent is a top human behavior and analytics advisory firm specializing in industries facing disruption and business transformation. As catalysts of progress for more than 40 years, we transform data and insight into a profound understanding of what drives human beings. And we help businesses turn those drivers into actions that build brands, enhance customer experiences and inspire product innovation.

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

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