

cogent syndicated

2026 Research Catalog

Unique, dynamic solutions designed
to meet your evolving needs

NEW THIS YEAR

We continue to leverage the full capabilities of Escalent Group to bring these new solutions to our clients. If you're interested in learning more about any of these offerings, **send us a note**.

The Advisor Exchange™ Community

Now in its second year! The Advisor Exchange is an online community of financial advisors (registered reps and RIAs) for the exclusive benefit of our clients. Through the collaborative effort of in-house experts from Cogent Syndicated and C Space, The Advisor Exchange community is a multi-client arrangement that offers participating clients deeper qualitative insight, 24/7 access to advisors, speed and a platform for advisor-centric product and service development at a fraction of the cost of a proprietary community. With a combination of Cogent-sponsored and client-specific activities, The Advisor Exchange provides an ongoing stream of valuable insights you can't get anywhere else.



Click to learn more

New Products & Topics We're Exploring

- **Institutional Consultant and Gatekeeper Brandscape.** Examine the perceptions and images of leading asset managers through the lens of institutional consultants (field and research consultants) and gatekeepers (professional buyers), including key asset manager evaluation and selection criteria and areas of competency that firms must demonstrate to strengthen their competitive position and increase consideration potential.
- **Alternative Investments Metrics Tracking.** Assess key brand metrics including unaided consideration, awareness and purchase intent among financial advisors for the leading alternative asset managers on a quarterly cadence.
- **Investor Segmentation.** Pinpoint your most receptive and valuable affluent investor customers and get critical insights for optimizing messaging and communication strategies.
- **Investor Audience Activation.** Apply predictive models based on Cogent data to expand your audience and select platforms and partners for desired media activation.
- **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.

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



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 2026	Financial advisors	\$30,000
US Institutional Investor Brandscape®	Mar 2026	Institutional investors	\$50,000
Trends in Alternative Investments™	Apr 2026	Advisors/investors	\$30,000
Retirement Planscape®	May 2026	401(k) plan sponsors	\$45,000
Advisor Brandscape®	Jun 2026	Financial advisors	\$50,000
DC Participant Planscape™	Aug 2026	DC plan participants	\$40,000
Investor Brand Builder™	Oct 2026	Affluent investors	\$40,000
Retirement Plan Advisor Trends™	Nov 2026	DC advisors	\$40,000
Advisor Use of Model Portfolios and SMAs™	Dec 2026	Financial advisors	\$30,000



Continuous Data Collection

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.

Product	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
Brand Lift	Monthly or quarterly	Financial advisors/ Affluent investors	Contact us




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
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
Alternative Investments Metrics Tracking	Quarterly	Financial advisors	Contact us
Trajectory of Intergenerational Wealth Transfer	Semiannual	Affluent investors	\$25,000





Make the most of your Cogent Syndicated subscription.

BUNDLE OUR RESEARCH FOR MORE COMPREHENSIVE INSIGHTS (AND DISCOUNTS!)

When you bundle multiple syndicated reports together, you benefit from broader insights from our industry experts and enjoy discounted pricing. Consider these options or contact us to create your own.

Financial Advisors

- Advisor Brandscape
- Trends in Alternative Investments
- Advisor Use of Model Portfolios and SMAs
- Annual Media Consumption
Advisor Summary

Affluent Investors

- Investor Brand Builder
- Trajectory of Intergenerational
Wealth Transfer
- Investor Segmentation
- Audience Activation

Alternative Investments

- Trends in Alternative Investments
- Quarterly/semiannual Alternative
Investments Metrics Tracking

Retirement

- Retirement Planscape
- DC Participant Planscape
- Retirement Plan Advisor Trends

Asset Managers

- US Institutional Investor Brandscape
- Advisor Brandscape
- Institutional Consultant and
Gatekeeper Brandscape

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.

BESCI X AI™

BeSci x AI is a proprietary, behavioral science (BeSci) model powered by AI that produces better behavior change strategies and takes human understanding at speed to the next level. It helps businesses that are struggling to motivate behavior change. As a custom, AI-powered classification assistant, it analyzes six dimensions of behavior—compared to other solutions that only analyze two dimensions—and pairs the powerful model with a philosophy Escalent calls "Human-Guided AI." BeSci X AI blends behavioral science framework, AI and human expertise to classify likelihood to effect change with 98% accuracy.

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



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- 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 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 1,600 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.

