



cogent syndicated

2022 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.

Unique, dynamic solutions designed to meet your evolving needs.



Click the report and product names in the tables below to learn more, including what's new this year, areas of inquiry, sample size, methodology, and schedule.



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
US Institutional Investor Brandscope	Mar 2022	Institutional investors	\$45,000
Retirement Planscape®	May 2022	401(k) plan sponsors	\$40,000
Advisor Brandscope®	Jun 2022	Financial advisors	\$45,000
DC Participant Planscape™	Jul 2022	DC plan participants	\$35,000
Retirement Plan Advisor Trends™	Sep 2022	DC advisors	\$35,000
Investor Brand Builder™	Oct 2022	Affluent investors	\$35,000
Annuity Brandscope™	Nov 2022	Advisors, affluent investors	\$25,000
Advisor Use of Model Portfolios & SMAs™	Oct 2022	Affluent investors	\$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.

Portal	Release	Audience	Investment
Cogent Beat™ Advisor	Monthly	Financial advisors	\$125,000
Cogent Beat™ Investor	Monthly	Affluent investors	\$115,000
Media Consumption™ Advisor	Monthly	Financial advisors	\$35,000
Media Consumption™ Investor	Monthly	Affluent investors	\$25,000

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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](#)



On-Demand Insights

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.

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.



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.

