

## 2015 Investment Trend Monitor Report: Advisors' Views on Firm Marketing Support

### Education That Advisors Value

Fact sheets, product knowledge and help building a business are what advisors want most in terms of marketing support.



Advisors report that firm marketing support is most helpful when it contributes to their knowledge about specific products. That was just one of the findings of a recent survey by WealthManagement.com and FUSE Research Network of more than 771 advisors about their views on firm marketing support

#### Among The Study's Other Findings:

- Advisors reported that printed materials that help develop knowledge, such as fact sheets, thought leadership and value-added practice support, are more helpful than company profiles and product pitch books.
- Most advisors were interested in a broad range of value-added program topics, with economic and market insights ranking as most interesting and alternative investments ranked the least interesting.
- Advisors report that direct interactions with fund companies, such as speaking at company events and participating in firm training programs, are more effective means of shaping advisor opinions. Yet advisors also say they prefer to receive information via email.

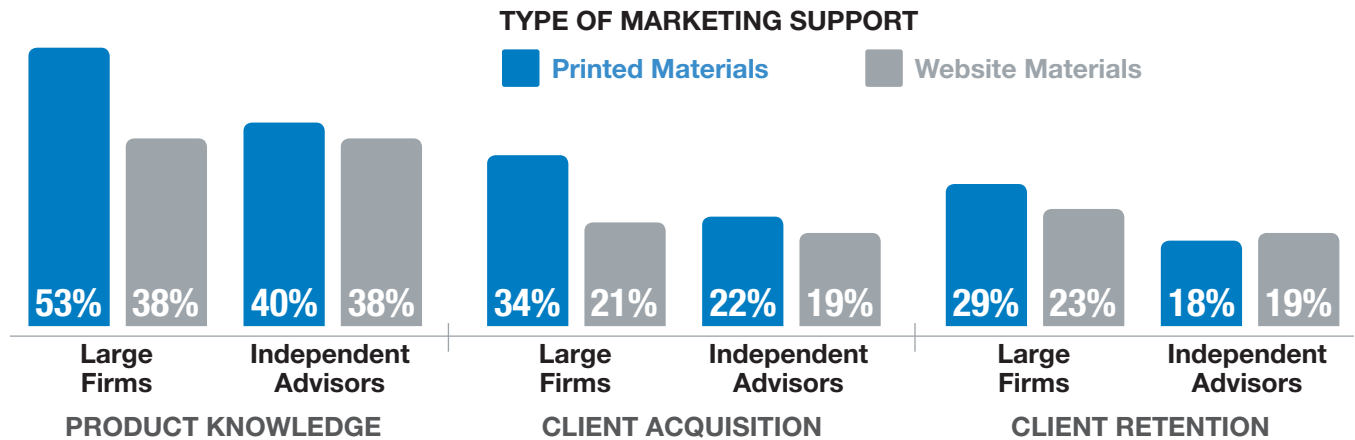




**...PARTICULARLY AMONG LARGER FIRMS**

Advisors at larger firms, namely regional firms and national wirehouses, were more likely to report that printed materials have a real impact on product knowledge and client acquisition and retention than advisors from independent broker dealers or RIAs. Yet both independent advisors and advisors from large firms had similar views when it came to the impact of website materials.

**A Preference For The Printed Word**



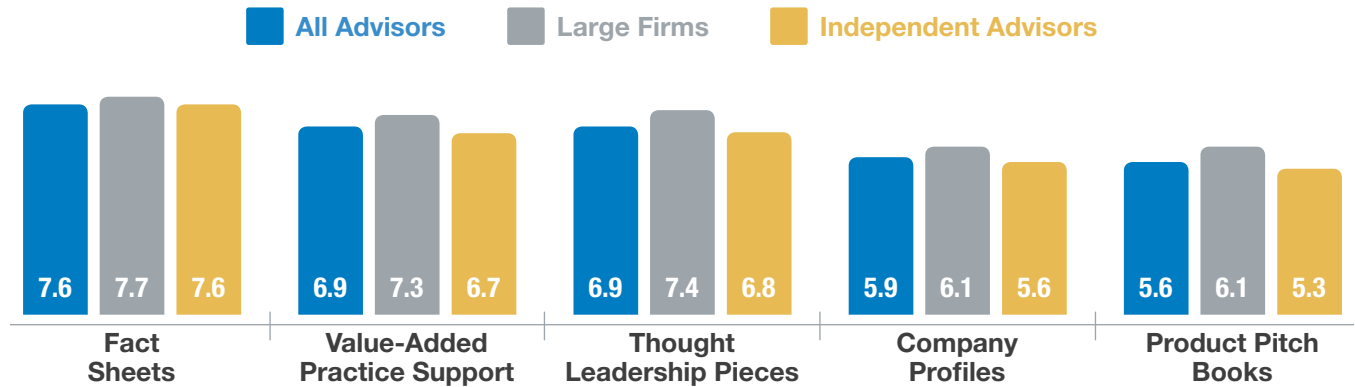
Interestingly, there was no significant difference between the average age of advisors in these two channels who replied to the survey, 50 vs 51 years for large firms and independents, respectively. But within each channel, advisors who favored printed materials tended to be a few years younger than advisors who reported that printed materials had little to no impact on product knowledge.



**HELP ME DO A BETTER JOB**

Advisors reported that printed materials aimed at helping develop knowledge, such as fact sheets, thought leadership, and value-added practice support, are more helpful than company profiles and product pitch books. This pattern is consistent with earlier findings, where marketing support had a greater impact on advisors' own product knowledge than it did on client retention or acquisition.

**Value Ranking Of Various Printed Materials (On A 10-Point Scale) .....**



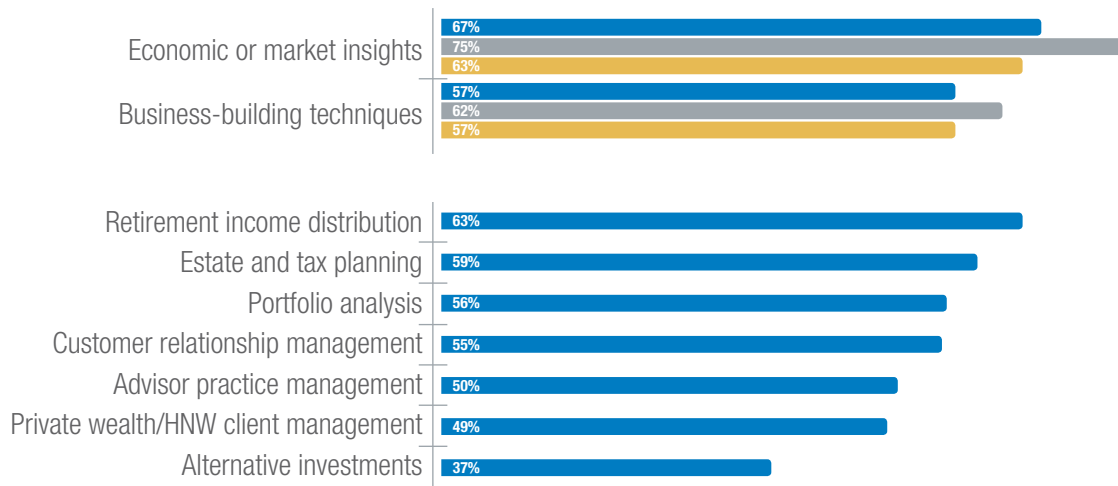
Advisors who work at large regional firms and wirehouses were more interested in printed materials in general, ranking them as more useful across all five areas than advisors in the rest of the industry, particularly independent broker dealers and RIAs. The difference was more pronounced in the non-fact sheet categories, however. Regional firms and national wirehouses may have more clearly defined internal channels to control the flow of marketing materials to their advisors. As a result, advisors at these firms may be more open to outside input once it makes it through those channels, particularly on matters such as thought leadership and pitch books, compared to their independent counterparts.



**Hungry for business**

Economic or market insights were the top ranking valued-added program delivered by asset managers, in terms of advisor interest. That said, advisors expressed interest in many topics, with the exception of alternative investments. Some advisors also indicated interests in topics not included in the list, such as “competition analysis” and “female-focused research.” Many of the responses can be summed up in a comment from a financial advisor with just two years of experience at a national wirehouse firm who said this about his interests in value-added program topics: “Anything that will help get the business off the ground and running.”

**Percent Of Advisors Showing Interest In Value-Added Program Topics** .....



Advisors from large firms were more interested in topics related to economic or market insights and business-building techniques than were their independent counterparts. Interestingly, advisors from large firms who were interested in business building were, on average, five years younger than their counterparts who were less interested.

