

# REBUILDING INVESTOR TRUST

2014 EDITION

It's been five years since the heart of the financial crisis. Our study has been evaluating and tracking the mindset and behaviors of affluent households since that time.

In our fourth edition of this important study, you will find:

- Advisory firms and financial professionals have gone a long way to regain trust and strengthen client satisfaction.
- Despite positive market environment and strong advisor evaluations, investors are still risk-averse, client acquisition is becoming more challenging, and advisors are having to deliver on more than portfolio performance.

# There are many opportunities to broaden and strengthen relationships and to encourage acquisition.

Our study provides insights to help you:

- Understand what investors are truly seeking from their advisors and advisory firms
- Strengthen your bond with investors
- Maximize referrals from friends and family
- See to what extent to leverage social media
- Compare client preferences and behaviors across top advisory/investment firms

## THIS YEAR'S STUDY INCLUDES

- More than 1,800 respondents with \$100,000K+ in investable assets; 15% with \$1MM+
- Five-year trending data since the financial crisis
- NPS for 40 advisory, investment, banking and insurance firms
- Key driver analysis on what impacts advisor NPS

## INSIGHTS FROM PEOPLE WHO KNOW YOUR AUDIENCE

*Rebuilding Investor Trust* is the result of a partnership between two industry experts with deep experience in financial services: Sullivan, a brand engagement firm, and Northstar Research Partners, a market research consultancy.

## PRICING & DELIVERABLES

For a fee of \$24,500 your firm will receive:

- Executive summary with actionable conclusions and recommendations
- Detailed strategic report, including all key findings and trending analyses
- Presentation of findings either in person in NYC or via phone
- Data set of survey results
- Cross-tabs with statistical testing

Get smarter about today's investors.

Purchase *Rebuilding Investor Trust*.

## CONTACT US

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