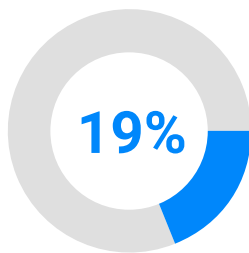


U.S. Financial Advisor Satisfaction Study

The **J.D. Power U.S. Financial Advisor Satisfaction StudySM** helps wealth management firms understand how effectively they are servicing their affiliated financial advisors. Delivering a financial advisor experience that maximizes both loyalty and productivity is critical for success, given the risk of dissatisfied advisors taking your firm's clients to a competitor. Your subscription will help you to understand and leverage the dynamics that drive satisfaction among different types of advisors. The study will reveal strengths and weaknesses relative to your key competitors, as well as opportunities for immediate and long-term improvement.



19% of wirehouse advisors intend to leave their firm within the next 1-2 years.



1 in 10 independent advisors have considered leaving their firm in the next 1-2 years.

“THE DRIVERS OF ADVISOR SATISFACTION DIFFER BY THE TYPE OF FIRM RELATIONSHIP. IT'S CRITICAL TO UNDERSTAND THESE DIFFERENCES IN ORDER TO PROMOTE ADVISORS LOYALTY AND PRODUCTIVITY.”

Mike Foy

Senior Director of the Wealth Management Practice at J.D. Power

Deliverables:

- Customized executive presentation and strategy session that gives you data-driven, actionable recommendations for achieving your strategic business goals
- Executive briefing document highlighting key trends and insights across the industry
- Scorecard benchmarking your company's performance compared with the industry across key drivers of satisfaction, loyalty and advocacy metrics
- Competitive survey data and industry reports including information on customer segments
- Data and analytical tools for performance insights and competitive comparisons with your peers
- Access to VoX Platform—J.D. Power's proprietary interactive reporting interface
- The complete study data file with consumer survey responses