In a world where information is at advisors’ fingertips, 24/7, from a never-ending stream of sources, asset managers need to ensure they are delivering the information, tools and resources advisors need when, where and how they want it.

Today, that means having a robust digital presence that continuously engages advisors in a meaningful way and promotes a differentiated brand image that drives AUM and engenders loyalty.

Introducing the J.D. Power U.S. Advisor Digital Engagement StudySM, which explores how financial advisors consume information via digital channels as part of their decision-making process for which products to recommend to their clients.

**Performance Ratings of Digital Channels:**

**Areas Explored**
- Email
- Website
- Webinars
- Mobile Apps
- Podcasts
- Social Media

**Specific goals of the study include:**

**Understanding the Role of Digital Media**
- What, realistically, can asset managers expect to achieve via a digital strategy?
- Which tools, specifically, are best suited to each goal, from brand building to driving Assets Under Management (AUM)?
- What types of brand imagery is digital best suited to support?

**Optimizing Digital Media Strategy**
- What combination of digital channels maximizes engagement and drives AUM?
- How should asset managers tailor their digital strategies to optimize impact among different advisor segments?

**Benchmarking Performance of Leading Managers**
- Which asset managers have developed the most highly optimized digital strategies according to financial advisors?
- What brand imagery is being reinforced by specific asset managers’ digital strategies?
- Which asset managers’ websites are advisors most satisfied with and which do they leverage the most?

**Methodology:**
- Targeting for a sample of 1,500 financial advisors with Assets Under Management (AUM) of $5 million+ and above
- Up to 6 evaluations per Financial Advisor from the top 20+ leading asset managers by those who actively work with or are considering a relationship with the firm
- Analyzed by channel, level of AUM, gender, tenure, producer type and product producer type (mutual funds, ETFs)
- Data collected by Fall 2019 with final reporting in November 2019

**Subscription Deliverables:**
- Executive briefing document with key trends and insights
- Customized presentation & strategy session
- Scorecard benchmarking your performance vs. industry benchmarks
- The complete study data file with consumer survey responses