

# J.D. Power U.S. Advisor Online Experience Study

The J.D. POWER ADVISOR ONLINE EXPERIENCE SATISFACTION STUDY evaluates how financial advisors digitally interact with asset management firms and how that digital experience affects their brand impressions and future intentions to invest client assets with those firms.

For asset managers in the current marketplace, forging and maintaining successful relationships with advisors is increasingly about effective digital engagement. Our research has shown that asset managers who have the highest levels of digital engagement with advisors are also achieving the best brand perceptions and reaping the largest inflows of new investment from those advisors, while asset managers with less digital engagement are falling further behind. This study provides a thorough understanding of the digital needs, expectations, and desires of today's advisors.

## EXPERIENCES EXPLORED

We pinpoint the factors that matter most to investors using digital channels and what drives their satisfaction. Using this data, we set a quality benchmark for the industry, and provide a thorough understanding of the digital needs, expectations, and desires of today's full-service, self-directed, and retirement plan investors.

To help you drive results, customers surveyed for this analysis answer questions about key topics such as:

- Logging in
- Account balance and activity
- Investment performance
- Review your portfolio
- Research investment options
- Transfer funds
- Trading
- Summing it up
- Advocacy & loyalty
- Current events & market conditions

## SUBSCRIPTION DELIVERABLES

- Customized executive presentation and strategy session that gives you data-driven, actionable recommendations for achieving your strategic business goals
- Data and analytical tools for performance insights and competitive comparisons including access to PowerSource
- Executive Overview Dashboard
- Detailed Results Dashboard
- Cross Table Tool
- Verbatim Comments
- Executive briefing document highlighting key trends and insights across the industry
- Brand-level scorecards benchmarking each profiled company's performance compared with the industry across key drivers of satisfaction, loyalty and advocacy metrics
- The complete study data file with consumer survey responses