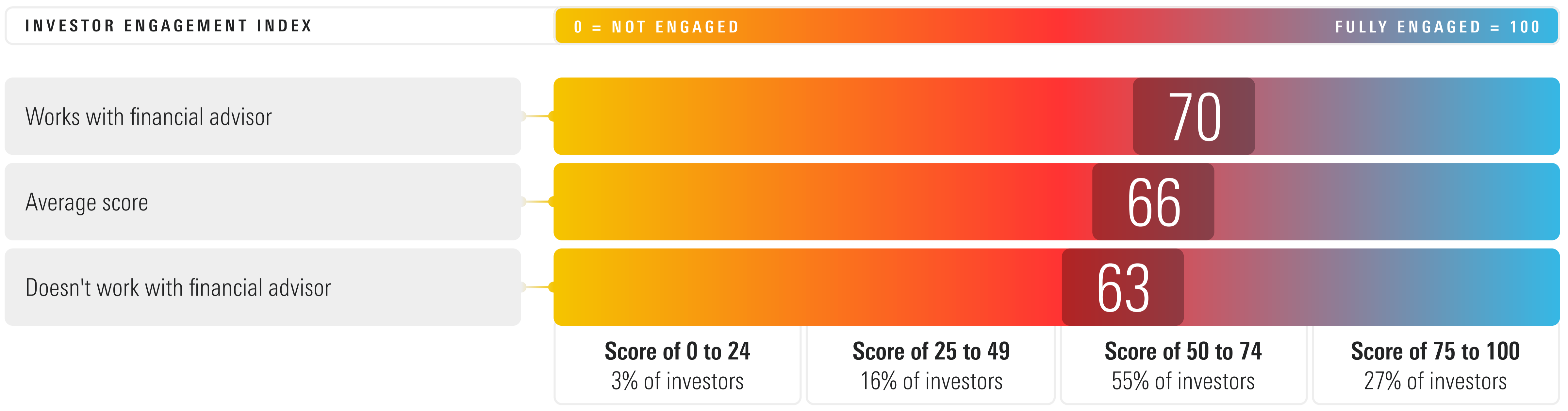


# How Advisors Can Deliver Personalized Experiences Using Investor Engagement Research

Those who work with financial advisors generally feel more informed, clear, and engaged in their investment activities.

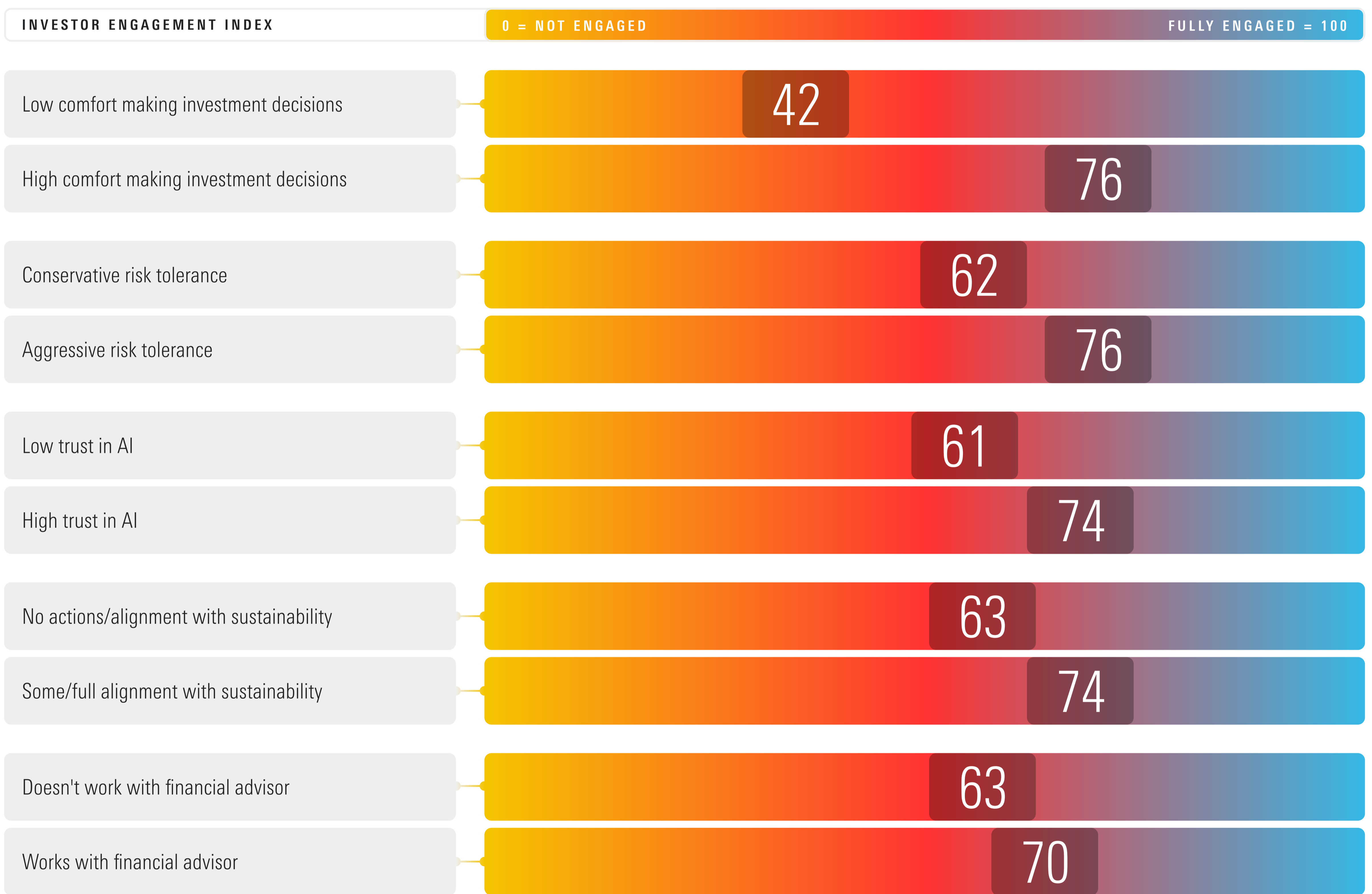


### Investor Engagement Index Components

◆ = Areas where advisors are making a noticeable impact

- ◆ Feeling informed about composition and performance of investments
- ◆ Understanding of investment concepts and financial markets
- ◆ Frequency of investment goals review
- ◆ Alignment of investment strategy to long-term goals
- Frequency of investment portfolio review
- Involvement in investment decision-making
- Frequency of engagement in financial education activities

### Which factors are typically associated with higher engagement?



Use the engagement difference in each group to personalize your client conversations.

Our research found that the difference between these groups across all components were statistically significant.

