From Retirement Income Planning to Goals-Based Wealth Management

An IQ Database™ Timely Topic report – June 2017

Overview

Hearts & Wallets Timely Topic reports cover new research from the IQ Database™ that hit on current industry themes, debates, and questions.

This report covers the state of consumer's income plans for retirement; their **plan status, inspirations and components**. The study looks at these factors by year, life stage and wealth group as well as by "Store" (where consumers buy investment products and services,) providing a good dose of competitive intelligence. This framework serves as a **roadmap for transitioning to goals-based wealth management** using a consumer-oriented mindset.

What's Included?

- Plan Status: From "vague idea" to "written plan"
- Inspiration: Advisor, employer, spouse, friends and more
- Components: Within "Plan", "Invest" and "Manage" categories
- Life Stages: Late Career, Pre-Retirees/Fully Employed Senior, Post-Retirees
- Wealth Group: Affluent ($100K+)
- Stores: Customers of 19 leading financial providers

How This Research Helps

- Learn which income plan components are in demand and which Stores are delivering on customer needs.
- Understand what goals are important to consumers before and after retirement and how they differ.
- See how Spouses are becoming more influential and which stores are excelling at tapping into this trend.

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Report includes: 39 Pages and 22 Exhibits

About the IQ Database™

The Hearts & Wallets Investor Quantitative Database™ is the most comprehensive resource for understanding and analyzing behaviors and attitudes of retail savers and investors. With over 1,000 fields and derived variables, the breadth and depth of topics covered is designed with decades of hands-on experience in the marketing, product, service and research functions it serves. It covers consumers of all age and wealth segments, with more than 5,000 annual responses to an online survey fielded mid-year since 2010. Consequently, its large sample size of 35,000 U.S. households permits sizing and profiling of virtually any demographic, behavioral or attitudinal definition for consumer groups. Its national weighting methodology allows for comparisons across years and customer/shareholder bases of leading firms.

About Hearts & Wallets

Hearts & Wallets is the resource for retail investor data and insights. Combining a consumer marketing framework with financial services operating experience, the company has a mission to be a catalyst for consumer-driven innovation in retail investing and saving. Hearts & Wallets data and insights are used by leading financial services firms to improve the effectiveness of their marketing communications, solution design and service delivery for retail investors.

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- ❑ I would like to order "From Retirement Income Planning to Goals-Based Wealth Management" for $10,000
- ❑ I would like to order "Trends in Investment Products: Active vs, Passive and Impact Investing" for $10,000
- ❑ I would like to order both Timely Topic reports for a special price of $18,000 (through August 2017)

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