



SUPERCHARGE YOUR CQ

Connection Quotient (CQ) measures the degree to which the dialogue between asset managers and financial advisors creates mutual benefits.

AVERAGE ASSET MANAGER CQ



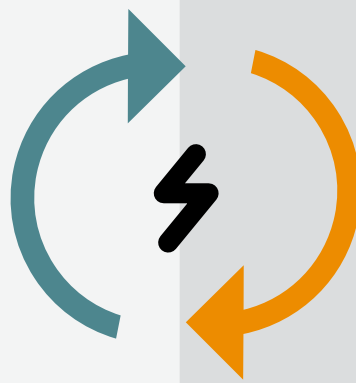
THE POWER OF CQ

DRIVING THE CONNECTION QUOTIENT (CQ) BENEFITS EVERYONE

ASSET MANAGERS

Benefits:

- ⚡ Retaining/Increasing business
- ⚡ Raising brand recognition
- ⚡ Receiving client referrals
- ⚡ Increasing access
- ⚡ Expanding willingness to try new products



FINANCIAL ADVISORS

Benefits:

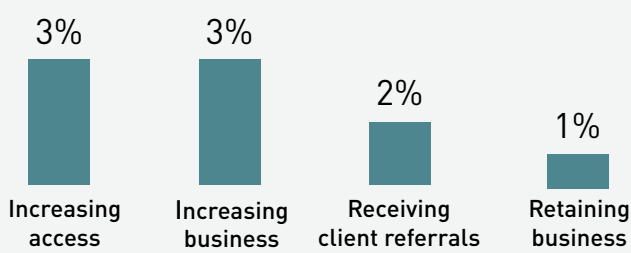
- ⚡ Making well-informed decisions
- ⚡ Achieving personal success
- ⚡ Feeling valued

RE-ENERGIZE THE RELATIONSHIP

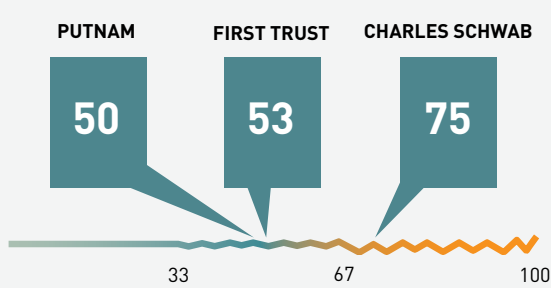
BOOSTING CQ DEMANDS ORGANIZATION-WIDE COLLABORATION

REALIZE THE VALUE

THE FIRMS WITH THE HIGHEST CQ SEE THE BENEFITS*



FIRMS WITH HIGH CQ*



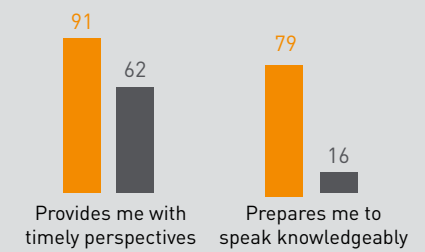
*Identified by respondents as more thoroughly meeting their high-priority advisor needs.

MEASURE IMPACT

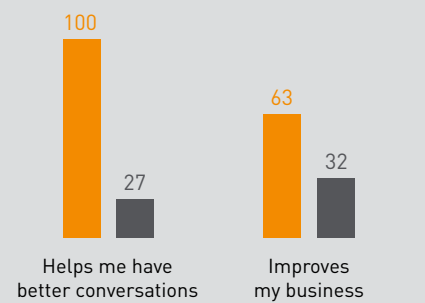
IMPORTANCE How important the attribute is to advisors **VS.** **PERFORMANCE** How top firms scored

TOP MEASURES WORTH A CLOSER LOOK

Making well-informed decisions



Achieving personal success



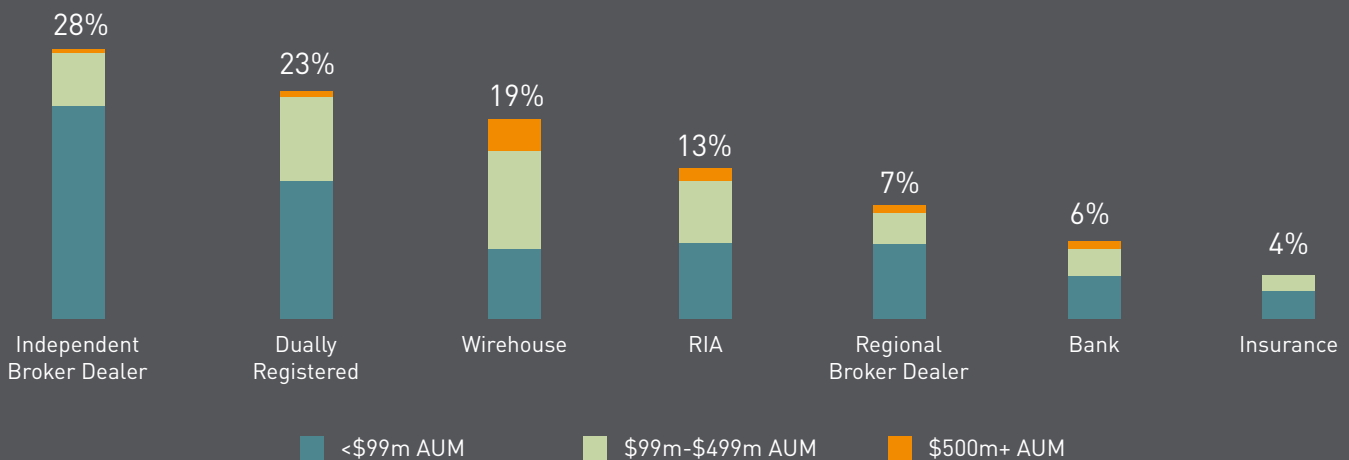
Feeling valued



PERSONALIZATION POWERS CQ

POWER YOUR CQ WITH WELL-EXECUTED ADVISOR TOUCHPOINTS. MAKE YOUR INTERACTIONS MORE MEANINGFUL, TIMELY, AND RELEVANT FOR MAXIMUM CQ.

SURVEY RESPONDENTS



► Sales ► Marketing ► Operations ► Technology

Data for this study reflects survey responses from 364 financial advisors. The sample represents the U.S. financial advisors with portfolio discretion, and reflects various channels, levels of assets under management and a mix of mutual funds and exchange traded funds (ETFs).

Survey respondents identified a firm that they perceive as providing the best service. They then compared the performance of their selected firm to that of other firms across almost 20 variables. Respondents also rated the importance of each of these variables on a scale of one to 10.

The identification of the firms in this report is for informational purposes only, based on the survey results, and is not intended to be and does not constitute an endorsement of any firm, or its services or offerings. ZS is not affiliated with any of the identified firms.

