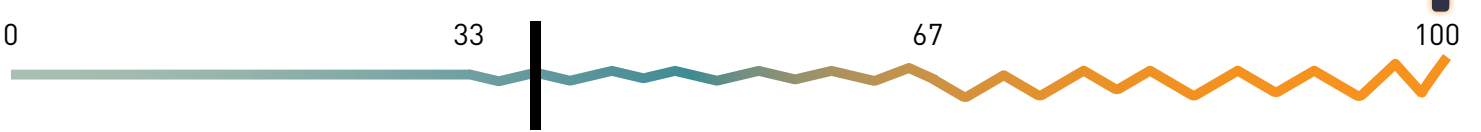# SUPERCHARGE YOUR CQ

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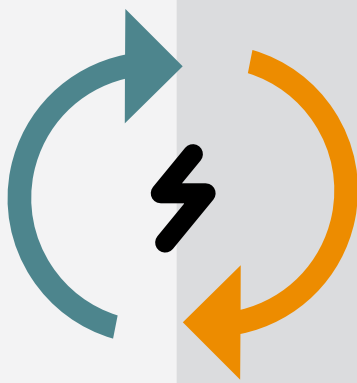
AVERAGE ASSET MANAGER CQ

0	33	67	100

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

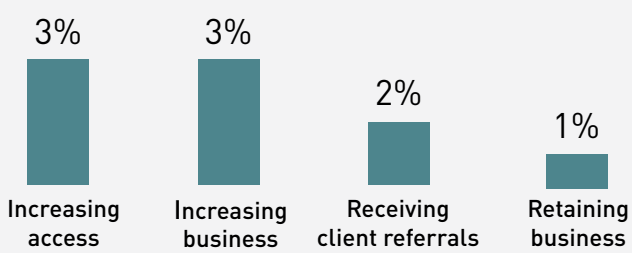### FINANCIAL ADVISORS

Benefits:
- Making well-informed decisions
- Achieving personal success
- Feeling valued

RE-ENERGIZE THE RELATIONSHIP

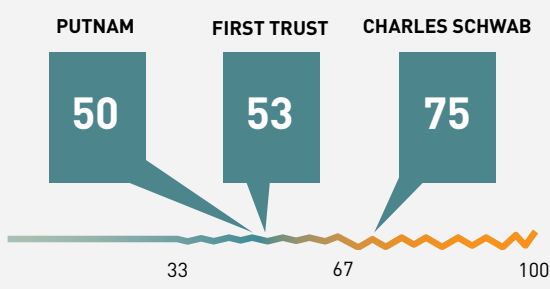### BOOSTING CQ DEMANDS ORGANIZATION-WIDE COLLABORATION

REALIZE THE VALUE

THE FIRMS WITH THE HIGHEST CQ SEE THE BENEFITS*

3%	3%	2%	1%
Increasing access	Increasing business	Receiving client referrals	Retaining business

FIRMS WITH HIGH CQ*

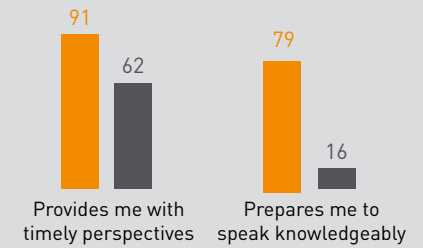| PUTNAM	FIRST TRUST	CHARLES SCHWAB
50	53	75

33	67	100

*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

	Importance	Performance
Provides me with timely perspectives	91	62
Prepares me to speak knowledgeably	79	16

Achieving personal success

	Importance	Performance
Helps me have better conversations	100	27
Improves my business	63	32

Feeling valued

	Importance	Performance
Understands me and my business	54	33

CQ

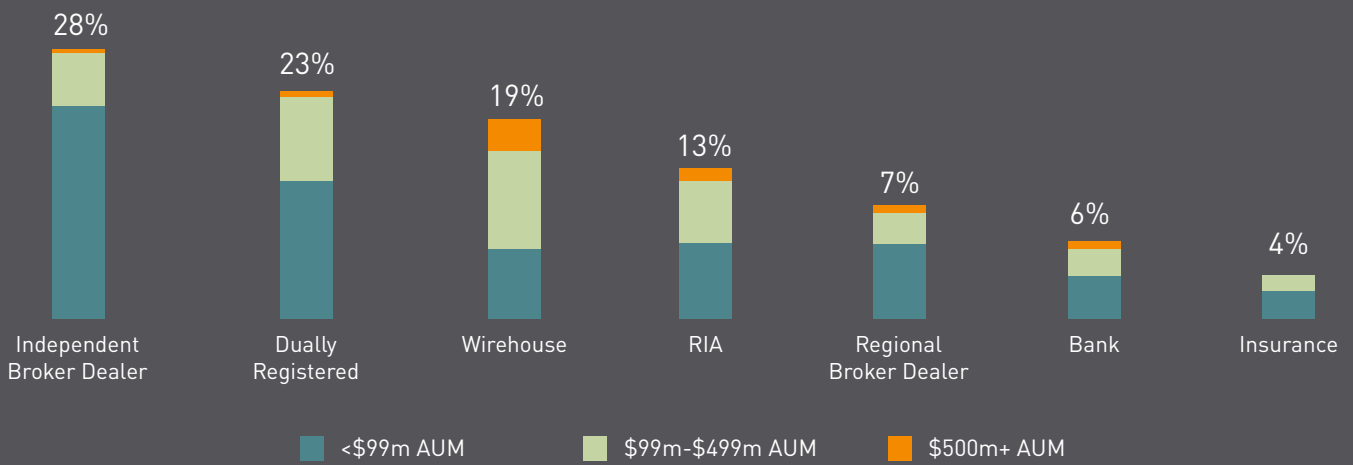## PERSONALIZATION POWERS CQ

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

SURVEY RESPONDENTS

28%	23%	19%	13%	7%	6%	4%
Independent Broker Dealer	Dually Registered	Wirehouse	RIA	Regional Broker Dealer	Bank	Insurance

- <$99m AUM
- $99m-$499m AUM
- $500m+ AUM

▶ Sales ▶ Marketing ▶ Operations ▶ Technology

ZS