

# Financial Advisor Media Outlook and Usage Study FAMOUS



## DEEP INSIGHTS INTO HOW PROFESSIONAL FINANCIAL ADVISORS VIEW FUND FAMILIES AND USE MEDIA

Random sample of 10,000 registered financial advisors drawn from our proprietary database and cross-referenced to the SEC. Use and view financial media across broadcast, print and digital platforms. Web-based methodology and minimum of 10% response rate.

### WHERE DO ADVISORS GET THEIR INFORMATION?

### WHICH MEDIA BRANDS ARE THEY RESOURCING, and ...

### WHAT DO THEY THINK OF YOUR FINANCIAL PRODUCTS?



FAMOUS examines how advisors perceive and rely upon various media brands. Approximately:

- ❖ 30 different publications
- ❖ 50 different websites
- ❖ 10 different networks/40 individual programs
- ❖ 10 social media platforms (professional and personal)
- ❖ Mobile media and Apps
- ❖ Newsletters and podcasts



Profiles the financial advisor community like no other research report. Areas include:

- ❖ Type of firm (Wirehouse, RIA, Broker/Dealer)
- ❖ Size of firm – AUM, number of FAs employed
- ❖ Age, experience, certifications
- ❖ Assets under management – personally manage
- ❖ Type of clients – high net worth, individual, institutional – number of firms manage
- ❖ Types of ETFs recommended/used



### SNAPSHOT OF FUNDS INCLUDED:

- |                                |                      |                             |                      |
|--------------------------------|----------------------|-----------------------------|----------------------|
| ❖ Alliance Bernstein           | ❖ Dodge & Cox        | ❖ The Hartford              | ❖ OppenheimerFunds   |
| ❖ Allianz Global Investors     | ❖ Eaton Vance        | ❖ Invesco                   | ❖ Pimco Funds        |
| ❖ American Century Investments | ❖ Fidelity           | ❖ JP Morgan                 | ❖ Putnam Investments |
| ❖ American Funds               | ❖ Franklin Templeton | ❖ Nuveen                    | ❖ T. Rowe Price      |
| ❖ BlackRock                    | ❖ Goldman Sachs      | ❖ MFS Investment Management | ❖ Vanguard           |

**ERDOS & MORGAN** has been a leader in media market research for over 70 years. Our Syndicated studies – Financial Advisor Media Outlook and Usage Study (FAMOUS), Opinion Leaders and Purchase Influence in American Business – have helped organizations make smart business choices and consistently stay ahead of the curve. We also provide a full suite of custom market research solutions using both quantitative and qualitative methodologies. **ERDOS & MORGAN** is an independent operating unit of Beta Research Corporation with offices in New York, New Jersey and Massachusetts.