

Phoenix.

Global Wealth Monitor

AFFLUENT MARKET INTELLIGENCE

FOR MORE INFORMATION OR TO SUBSCRIBE:

David M. Thompson

david.thompson@phoenixmi.com

+44 (0) 20 3427 6157 / London Office

+001 860 404 5414 / New York Office

Strengthen client relationships.

Acquire new clients.

Accelerate product development.

Sharpen your messages.

Improve client retention.

Differentiate from the competition.

An Informed Perspective

As a financial professional serving affluent and high net worth (HNW) investors, success requires meeting targeted goals. Global Wealth Monitor from Phoenix Marketing International can help.

Phoenix Global Wealth Monitor, a syndicated marketing-research platform, continuously tracks the needs, attitudes and behaviors of affluent and HNW investors in the United States, Canada and seven European countries. You can get an informed perspective on factors such as:

- > Wealth, income, debt, age and other demographics
- > Investing approach, attitudes and outlook
- > Asset allocation, financial products owned and balances
- > Fund selection criteria and future intentions
- > Proportion of fund investments by brand
- > Fund portfolio (asset classes, fund types and funding intentions)
- > Advice orientation, advisors used and depth of relationship

A subscription-based service, Phoenix Global Wealth Monitor is now available in the UK, Germany, France, Spain, Italy, Switzerland and Russia.

No One Else Matches Phoenix

Only Phoenix Marketing International compiles exhaustive survey data on affluent and HNW investors, and produces customized reports with insight and advice to address your specific needs.

QUANTITATIVE DATA

Our data comes from online interviews with thousands of investors. We conduct surveys six times a year in the United States and twice yearly elsewhere. As a Phoenix Global Wealth Monitor subscriber, you can even include proprietary questions in each survey.

QUALITATIVE INSIGHT

In addition to collecting data, we help you make sense of it. In contrast with off-the-shelf reports, our reports are tailored according to your business needs. We identify relevant trends in the data and work with you to determine how they might impact your business.

EXPERT ADVICE

Finally, we turn insight into advice. Based on the trends, we help you figure out how to capitalize on unmet needs and opportunities. Our customized recommendations span client retention and acquisition, product development, messaging to target audiences and much more.

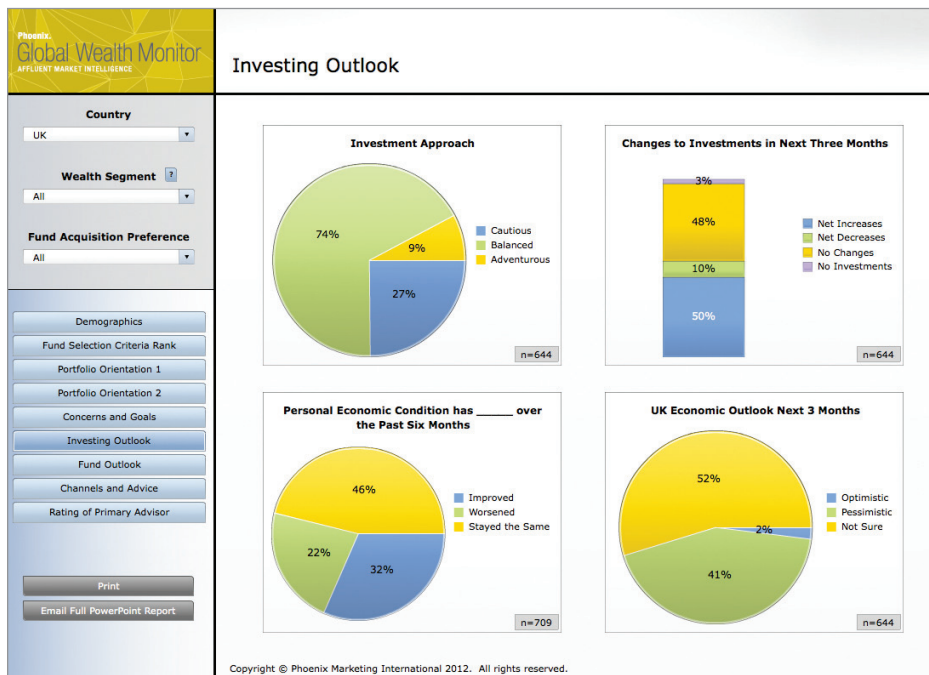
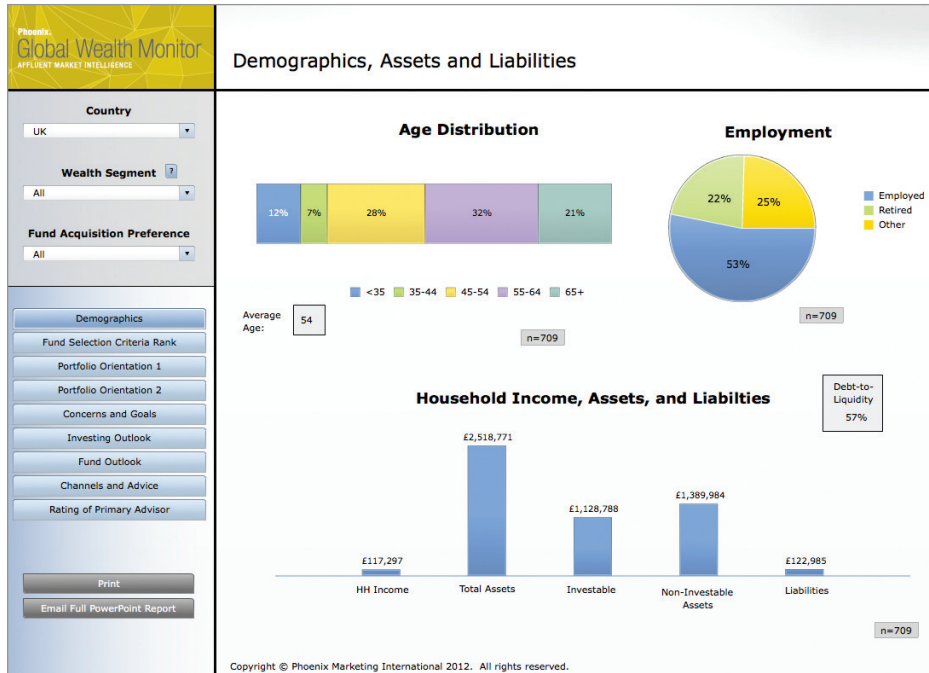
THE BOTTOM LINE: With Phoenix Global Wealth Monitor, you're not buying data; you're investing in a long-term relationship.

www.phoenixmi.com/GWM

On-Demand Affluent Investor Profiling

The new Phoenix Global Wealth Monitor *Dashboard Reporter* — an interactive, online analytical tool — lets you conduct your own analyses from our latest investor database. We customize the dashboard according to your unique business needs, such as geography, client wealth segments, demographics and product focus. Once you've selected your filtering and profiling variables, you can print out professional-quality charts and tables at the touch of a button.

Our market experts can help you operate the dashboard and interpret the data as well.



A Sampling of Clients

The many world-renowned brands that subscribe to our Global Wealth Monitor programs include UBS, HSBC, JP Morgan Chase, Citigroup, Visa, Fidelity, Mastercard, Morgan Stanley.



MEET DAVID M. THOMPSON

David, managing director of the Phoenix Affluent practice, is a leading expert on the affluent and HNW investor markets. He delivers the "Insight" and "Advice" components of Phoenix Global Wealth Monitor.

MORE ABOUT PHOENIX MARKETING INTERNATIONAL

Phoenix Marketing International is a leading global marketing research firm founded in 1998. Headquartered in New York and with offices throughout the United States and in London, Phoenix conducts business in over 60 countries worldwide.

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David M. Thompson
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