Press Release

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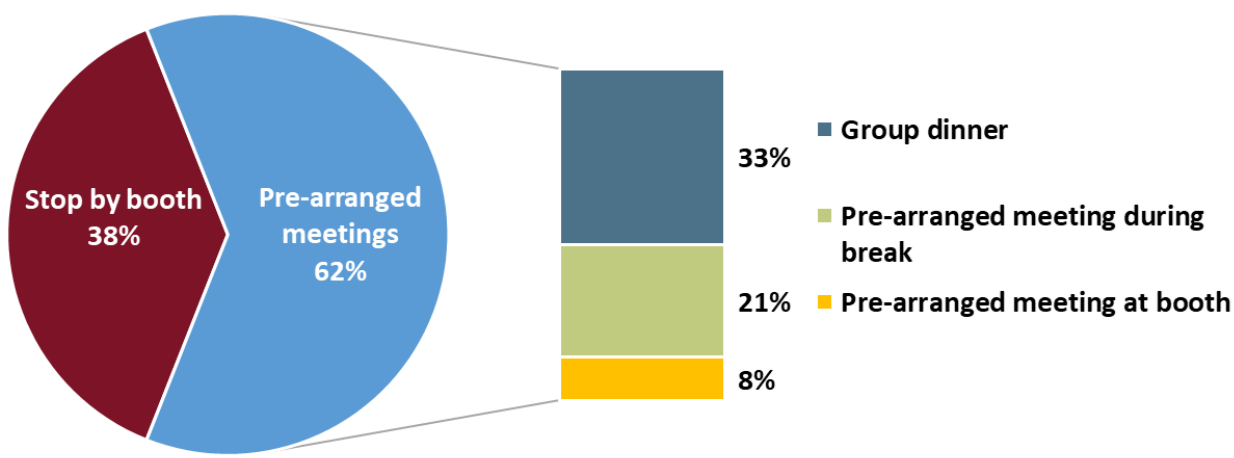
Optimize Conference Investment: Pre-arrange Meetings with Advisors

June 11, 2024, Needham, MA – Since access to financial advisors remains challenging, asset managers must maximize every touchpoint. Conference participation, which crosses multiple functions within an asset manager, presents an opportunity to engage with advisors in attendance. Based on findings from FUSE Research Network's Advisor Trend Monitor Series Report – *Marketing Support: The Advisor View*, more than 60% of advisors favor some type of contact via a pre-arranged meeting.

Preferred Interaction at Conferences



Source: FUSE Research Network

"Conferences are a significant outlay for organizations, potentially costing in the millions of dollars for the distribution team," said Mike Evans, Director of BenchMark Research at FUSE Research. "Senior management needs to ensure that the sales and marketing teams are properly leveraging these events. Pre-arranged meetings and group events are preferred by a majority of advisors. Identifying a target group of attendees for meetings/group events should be a priority. Firms not doing this are wasting an opportunity to interact with a captive audience of financial advisors."

The Advisor Trend Monitor Report – *Marketing Support: The Advisor View* explores how marketing teams can best engage advisors and what types of content deliver the most impact. In addition to advisors' views on conferences, the report shares insights on marketing materials and outreach including the effectiveness of tactics to influence advisors' opinion of a firm, social media usage, and advisor firm rankings for best reputation and thought leadership. The research is based on a survey of more than 625 financial advisors across all channels. Overall data survey findings are presented by various advisor demographics and year-over-year comparisons when pertinent.

The FUSE Advisor Trend Monitor is a survey-based report series that provides timely insight into advisor views on a range of issues central to asset managers' decisions about resource allocation.

For details about obtaining a copy of Advisor Trend Monitor – *Marketing Support: The Advisor View,* please email Deb Wetherbee at dwetherbee@fuse-research.com or call (617) 413-1960.

About FUSE Research Network LLC

FUSE was launched in 2008 to deliver tactical decision support that improves the effectiveness of the sales, national accounts, marketing, and product functions at investment management firms. To deliver on its unique value proposition, FUSE has built a decision support team that is unparalleled in its ability to deliver practical and actionable guidance in response to client challenges.
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