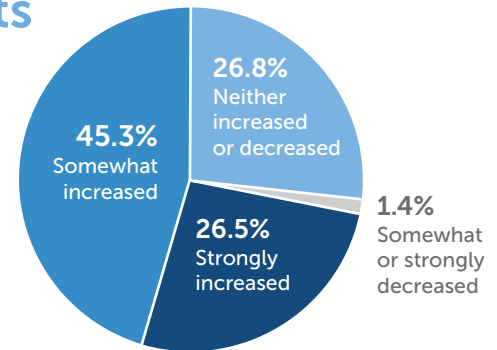
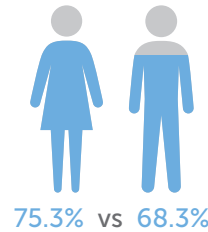


How can financial advisors capitalize on the opportunities presented by an aging client base?

Develop expertise in serving elderly clients

71.8% of current wealth management clients indicated that their interest in working with a financial advisor (FA) would be increased if he or she showed an expertise in meeting the needs of elderly investors, including working closely with families to help senior members make safe financial decisions. This interest is somewhat stronger among women than it is among men.



Provide protection:

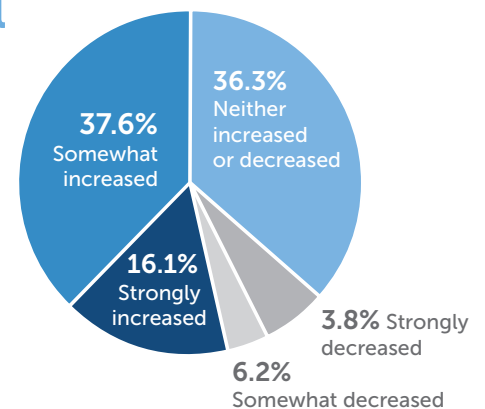
1 IN 5

Americans 65 and older has been abused financially.

Source: The Boston Globe

Use cognitive & behavioral assessment tools

There is strong support for using cognitive assessments to help protect investors. A majority (53.7%) of investors stated that their interest in working with an FA would be increased if the FA employed assessments design to protect investors and help develop strategies for addressing cognitive impairment.



9 to 1

The ratio of respondents who said their interest would be either increased or not decreased to those who said their interest would be decreased.

Be a trusted advisor in times of need



3 OUT OF 10 INVESTORS do NOT have a trusted family member or friend who could help them make financial decisions if they become physically or mentally disabled. Low net worth investors are more likely than high net worth investors to be without this support.

Source: Cogniscient market research survey of 1,000 investors who currently employ a financial advisor, April 2014, unless otherwise noted.

Cogniscient
www.cognisc.com

We design and develop cognitive and behavioral assessment applications delivered as a cloud-based software as a service (SaaS). We offer an assessment that is designed specifically to help protect investors from financial abuse. Contact us at 617 484 4893 or info@cognisc.com