

Advisor Engagement

Investnet's Analytic's new Advisor Engagement Module sets out to answer the one question all managers want to know:

Am I engaging the right advisors with the right product?

After analyzing the activity of some of our most-forward thinking analytics users, we have found that the answer to that question is a resounding 'no.' Our data shows that over 80% of the assets are concentrated in the top 30% of Advisors.¹

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Your opportunity with advisors is like an iceberg - largely unseen

Advisor Engagement will illuminate the opportunity that you were unaware of. Knowing the advisors that make up this opportunity and what they're likely to buy may lead to better outcomes.

¹Data from Investnet Analytics July 2023 to July 2024.

Product information

- Smart lists help to enable users to present the right product, to the right advisor, at the right time
- Advisor-level data based on current sales, 12 month sales, and AUM
- View lists by all programs
- Utilize advanced filters to focus on specific product vehicles and styles
- Build targeted marketing distribution lists to engage your advisors of the future

Demos and support

To request a demo, or if you have any questions:

Contact

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