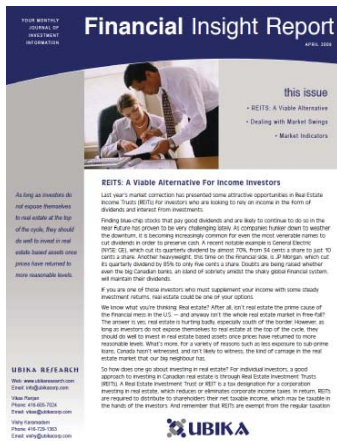


# UBIKA RESEARCH FINANCIAL INSIGHT REPORT

## INCREASE YOUR BUSINESS



Ubika Research offers a personalized **“Financial Insight Report (FIR)”** to Investment Advisors and Wealth Management Firms to help enhance their brand and client relationships.

In the current volatile market environment, regular and meaningful communication is vital to ensure that your clients have a balanced and long-term perspective to investing. This report can be personalized with name of the firm, Investment Advisor’s name, photo of the Investment Advisor, logo of the firm and any customized client messaging.

### BENEFITS

- » The FIR template is designed and developed by a professional graphic design firm to meet the highest standards of design quality
- » Reinforce loyalty with your current customers & establish ongoing communication and improve client retention
- » An excellent prospecting tool to generate new business
- » A great educational tool for current & prospective clients to introduce new investment opportunities
- » An excellent referral generation tool since a good “Financial Insight Report” will be shared by your clients
- » Helps “break the ice” with your clients during rough markets
- » Proactive response- the FIR demonstrates that you are on “top of things” particularly during these challenging times
- » Strengthens your identity and differentiates you from the competition

## FIR: SUPPORTING FACTS

A survey of Investment Advisors and Financial Planners reveals that 72.7% of those surveyed said that a communication medium such as a Financial Insight Report was an important part of their business building efforts for the following reasons, in order of importance:

- » Client communication and retention
- » Visibility strategy
- » Credibility building (reputation)
- » Deliver planning and investment education
- » Reinforce investment and business philosophies
- » Create new business



“...nearly 9 out of 10 advisers (89.7%) earning at least \$100,000 say that maintaining client communications is a significant concern to them...less than half of the advisers who are earning less than \$100,000 think client communications is important.”

*Source: CEG Worldwide study of affluent investors*



“You need a lot of contact with clients- between two and three contacts every month with every client. To accomplish it, you’ll want to create a system in which contacts are predetermined and easily replicated between clients.”

*Source: Financial Planning Magazine*