

# Phoenix.

Marketing  
International

Accelerated Performance through Research



Affluent Market  
Practice

## The Phoenix AMS Product Line

AMS Tracking  
Program – U.S.

Ultra High Net Worth  
Research Platform –  
*Private Wealth Study*

AMS Tracking  
Program – Canada

AMS Customized  
Market Profiles

# Introducing the Phoenix AMS UHNW Research Platform and the *Private Wealth Study*



From the leader in state-of-the-art research in affluent markets...  
Unprecedented Access to the Ultra High Net Worth (UHNW) investor

**T**he *Affluent Marketing Service*<sup>sm</sup> (AMS) of Phoenix Marketing International proudly announces the launch of our Phoenix AMS UHNW Research Platform, and our inaugural offering: *The Private Wealth Study*.

## Our UHNW Research Platform: Designed to overcome your market research challenges

Leading wealth management companies told us of their frustrations with existing research studies regarding the Ultra High Net Worth investor:

- "Traditional Internet, mail or phone recruitment methods don't reach the truly affluent, therefore the data is not representative;"
- "Most syndicated studies cannot address the complex issues we face in this market;"
- "We define our market by investable assets, not net worth."

marketing research. **The solution:** respondent recruitment through our network of non-profit organizations.

## Our extensive network is your key to access the UHNW investor

*Recruitment through a trusted source:* Our network of more than 170 non-profit US-based organizations have agreed to invite their wealthiest donors to participate in our research in exchange for a steady flow of incentive-based donations back to the participating organizations.

## It's a win-win-win

- Our **clients** get access to a diverse sample of UHNW respondents, qualified by investable assets.
- Wealthy **respondents** get to support their favorite non-profit or charity.
- The **non-profits** in our network get a steady flow of donations through questionnaire incentives.

## Guiding Principles in Life

	\$1MM - \$9.9MM	\$10MM+
Honesty	69%	79%
Choosing Own Goals	50%	59%
Curious	41%	49%
Self-Discipline	36%	50%
A Spiritual Life	24%	36%
Protecting the Environment	26%	41%
Preserving Public Image	21%	33%
Pleasure	19%	41%
Authority	16%	38%
Wealthy	17%	35%
Looking Good	14%	33%
Obedience	9%	24%

Top 2 Box Importance on 7 Point Scale.

UHNW investors told us that philanthropy could be the key to motivate them to participate in

## Non-profit Network Member Profile

- Majority are C-level executives and business owners; many are on the board of directors of the non-profit
- Median investable assets: \$9.5MM
- Geographically distributed; even distribution between male/female
- Non-profits in network are diverse, including healthcare, education, social, cultural, environmental



# Inaugural Offer: The Phoenix AMS – Private Wealth Study



Affluent Market Practice



## Syndicated content with the ability to add proprietary questions

The Phoenix AMS *Private Wealth Study* is designed to address the complex wealth management issues of the Ultra High Net Worth Market in the U.S., defined as households having a minimum of \$5 million or more in investable assets. It will consist of substantial syndicated content along with the ability to add proprietary questions by study subscribers.

The syndicated content of the study will focus on the complex topics that are of critical importance to companies that market to very wealthy investors (see adjacent topic areas). Charter subscribers to the *Private Wealth Study* will have considerable input on the content of the questionnaire.

To further drill down on key issues in the UHNW market that are critical to your organization, charter subscribers can insert up to six questions (closed or open-ended) that will be proprietary. Each subscriber will receive a customized report that will include an analysis of your proprietary questions.

## Study Launch: January, 2008

### Sample Design

- 600 completed interviews; approximately 25-30 minutes online (option to take written questionnaire)
- 300: \$5MM-\$9.9MM Investable Assets
- 200: \$10MM-\$19.9MM Investable Assets
- 100: \$20MM+ Investable Assets

### Deliverables

- Customized Powerpoint report: analysis of your proprietary questions along with syndicated content.
- Cross tabulations

### Pricing

- \$50,000
- Customized report: includes all syndicated content and three proprietary questions
- Custom Cross-tabs
- Four-, five-, or six-question insertion available at additional cost

## Accelerated performance through research

Through our syndicated and custom research services, the Phoenix Affluent Market Practice assists clients in understanding the trends and issues that impact their affluent and high net worth markets and in developing actionable strategies to drive revenue growth.

The Phoenix Affluent Market Practice is a division of Phoenix Marketing International, one of the fastest growing marketing services firms in the United States and partner to many of the largest companies in the financial services, consumer package goods, automotive, and travel and leisure industries worldwide. Phoenix also offers advanced advertising and brand measurement along with direct marketing expertise. Phoenix has offices throughout the US.

Phoenix offers a unique combination of industry expertise, methods and consulting services, combining primary and syndicated marketing research expertise with database analytics and modeling proficiency. Applying this information assists clients in improving the profit dynamics of their business.

## The Private Wealth Study: Key Topics

- Business Owners
  - Generational transfer and succession planning
  - Protection of business assets
  - Investment banking
- Wealth Transfer
  - Estate planning and use of trusts
  - Tax issues
- Retirement
  - Advisory needs, pre and post
  - Retirement income planning
- Risk Management
  - Product and service needs
- Philanthropy
  - Charitable giving products
  - Advisory needs
- Use of alternative investments and other structured products
- Use of credit
- Demographics for analysis purposes



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6423 Montgomery Street, Suite 12  
Rhinebeck, New York 12572  
Phone: 845.876.8228

[www.phoenixmi.com](http://www.phoenixmi.com)