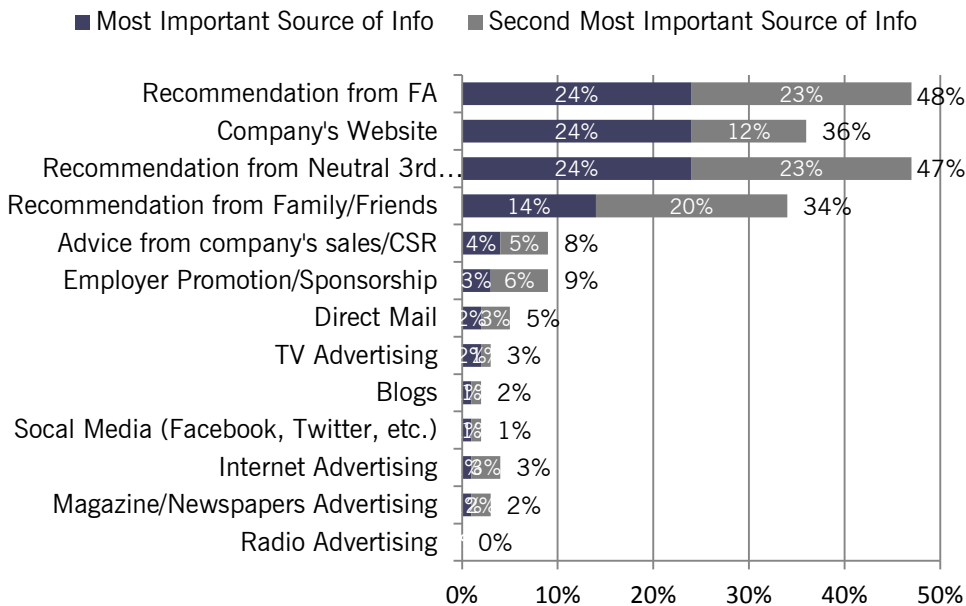


FOR MORE INFORMATION, PLEASE CONTACT NICOLE PALMER AT NICOLE.PALMER@PHOENIXMI.COM

Affluent Investors Rate *Recommendation from FA* as Most Important Source of Information About Retirement Products/Services

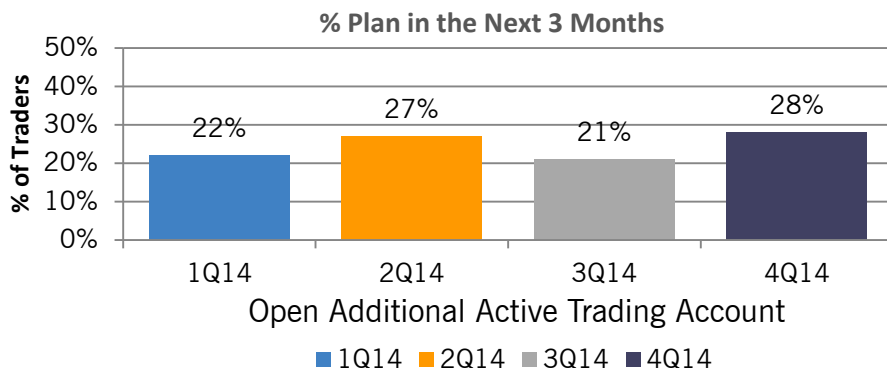
The semi-annual DIIP study probes affluent investors about their perception of companies providing insurance and investment products to fund retirement. The study provides major diversified investment and insurance providers with benchmarking, tracking, and analysis of customer behaviors and attitudes to support advertising and brand optimization.



Source: Fall 2014 DIIP Study [By Ellen Albert](#)

Many Active Traders Have Plans to Open an Additional Trading Account

Most recently, just over one-in-four Active Traders plan to open an additional trading account within the next 3 months, compared to only 21% last quarter.



Source: 4Q14 Active Trader Study [By Marc Grozalsky](#)

SPOTLIGHT

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- Global Wealth Monitor
- Active Traders
- Financial Advisors
- Diversified Insurance and Investment Providers (DIIP)
- Retail Banking
- Investment Services

Charles Schwab's "Why Print" Climbs to the Top Spot



After a drop to second place last month, Charles Schwab's "Why Print" is back to a first-place ranking in the category as measured monthly among affluent investors. In addition to In-Market Performance, the ad was also the first ranked for Creative Potential, Recall, Likeability, and enhancement of overall impression and consideration of the Charles Schwab brand. Respondents adored the father/son duo and thought the ad made a strong point in a cute way.

Source: January 2015 IS Study

[By Cait Robbins](#)

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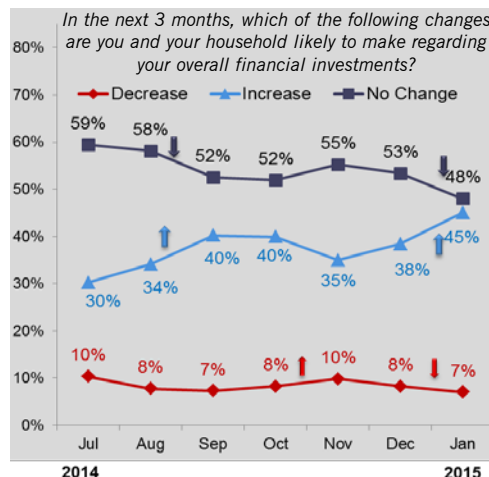
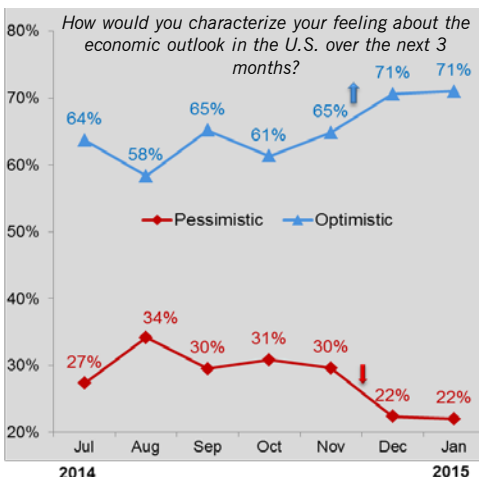
Improving Economic Sentiment Among HNW Households

Approaching and through January 2015, sentiment towards the U.S. economy rose to 71% among high net worth (HNW) households, establishing a new high over the past 12 months. Investment sentiment rose as well among millionaire households, although not as dramatically: 45% of HNW investors were likely to make net increases to their portfolios in the next three months.

HNW Investors - \$1 Million+ Investable Assets

Economic Sentiment

Investment Sentiment



Note: remainder were "Not Sure" in each period.

3-Period Trend

Note: remainder stated they "do not own any investments"

Source: Phoenix Global Wealth Monitor [By David Thompson](#)

SPOTLIGHT

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Chase Shows Military Support with "Let Us Serve You"



Chase's "Let Us Serve You" was the strongest performing print ad in the retail banking category this month. The ad's success can be attributed to stellar creative execution and its ability to enhance consumers' perception of the overall brand. Consumers found the ad respectful, and they appreciated Chase's recognition and support of the military.

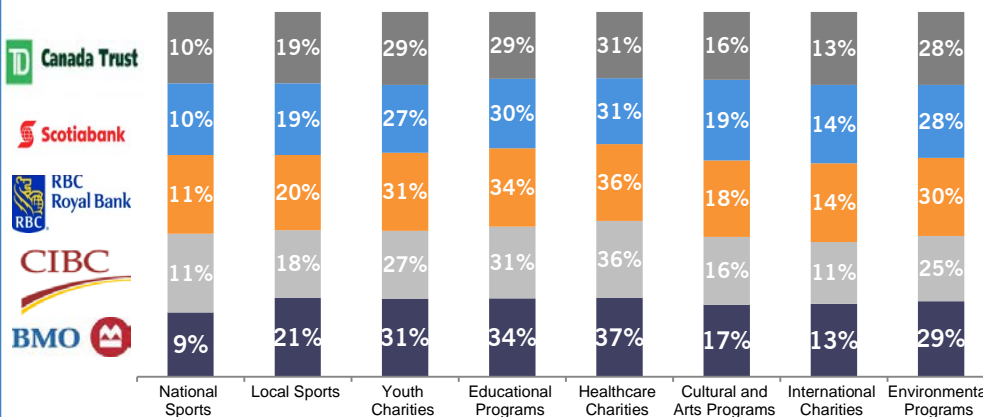
Source: January 2015 Retail Banking Study

[By Daniel Rivera](#)

Corporate Sponsorship Would Improve Brand Impression

Canadian Retail Banking consumers report that corporate sponsorship of Healthcare Charities would most improve their impression of the Big Five banks, followed by sponsorship of Educational Programs and Youth Charities.

% Top-2 Brand Impression based on Sponsorship Activities



Source: 4Q14 Canadian Retail Banking Study [By Daniel Rivera](#)