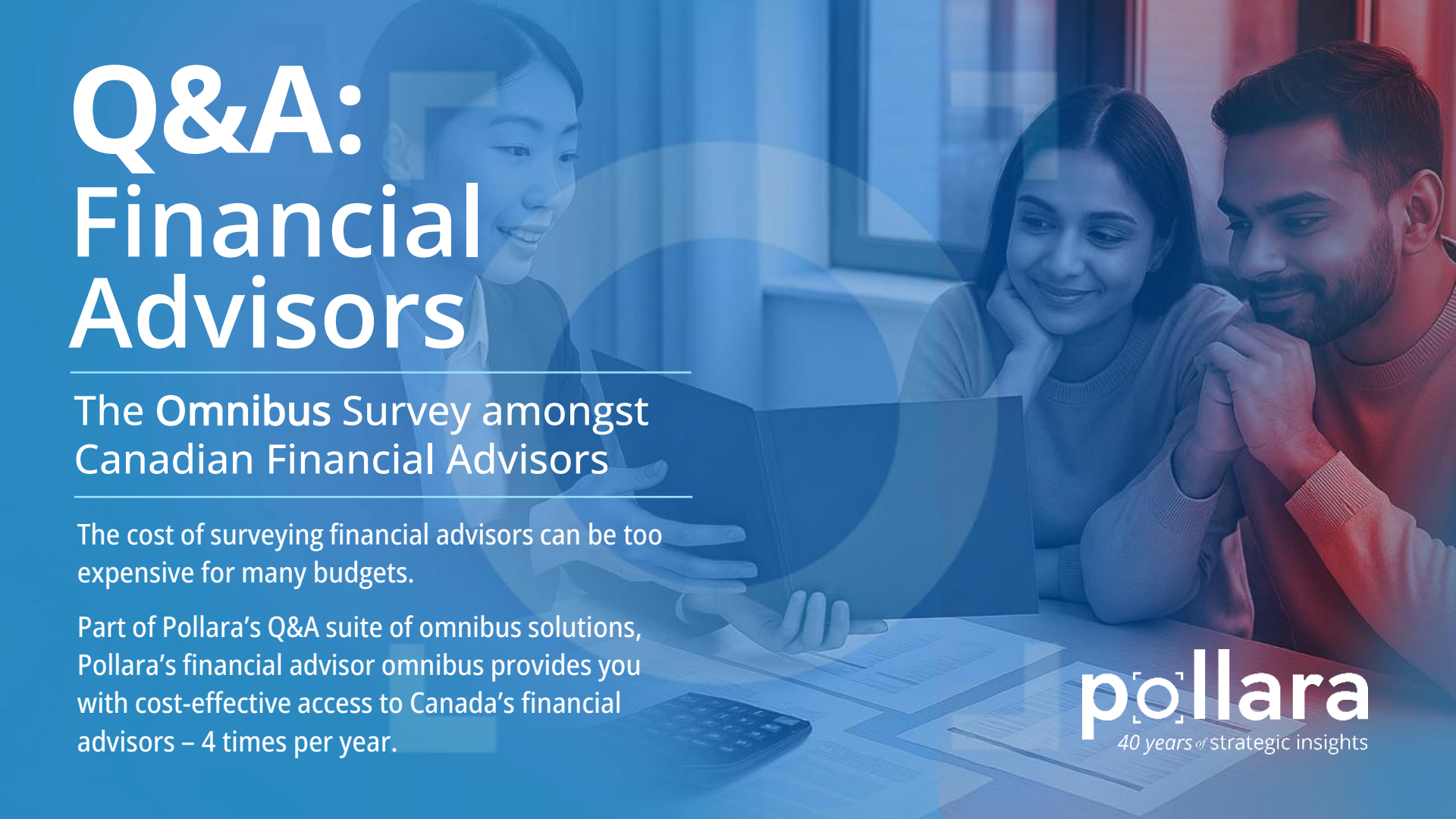




Q&A: Financial Advisors

The Omnibus Survey amongst Canadian Financial Advisors

The cost of surveying financial advisors can be too expensive for many budgets.

Part of Pollara's Q&A suite of omnibus solutions, Pollara's financial advisor omnibus provides you with cost-effective access to Canada's financial advisors – 4 times per year.

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40 years of strategic insights



One of Canada's
longest-standing
full-service research
firms, focussed on
providing strategic,
actionable, and realistic
advice to our clients.

Put our team's deep
financial sector
expertise to work for
you.

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Corporate profile

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- **Since 1985**, one of Canada's premier public opinion and market research firms
- Teams in Toronto, Ottawa, and Vancouver, with global capabilities
- Comprehensive toolbox of quantitative and qualitative **methodologies and analytical** techniques, and constantly innovating with **new cutting-edge approaches** to design, sampling, and analysis
- **Customized, creative solutions.**
- Design-through-deliverables engagement from **team** of widely-recognized and respected **senior researcher veterans** who are passionate about developing **long-term advisory partnerships**, helping clients make better decisions
- Deep expertise, extensive experience in **financial sector research, for banks, investment firms, insurance companies, pension plans, and governments.**

Methodology

- **Online survey** conducted amongst a randomly-selected, reliable sample of **N=300** Canadian **Financial Advisors**

PROVINCE	APPROX. SAMPLE
Atlantic Canada	20
Quebec	50
Ontario	100
Manitoba / Saskatchewan	30
Alberta	50
British Columbia	50
CANADA TOTAL	300

Each wave of Q&A:
Financial Advisors surveys
N=300 Financial Advisors
across Canada.

Timelines

- 4 waves per year:

WAVE	SURVEY DESIGN	SURVEY LAUNCH	DATA DELIVERED
1	January – February	Mid-February	Early March
2	March – April	Mid-April	Early May
3	June – July	Mid-July	Early August
4	September – October	Mid-October	Early November

Our Financial Advisors
omnibus survey fields
4 times per year.

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Deliverables

- **Data tables** will:
 - Include up to 2 banners of cross-tabulations based upon demographics, occupation details, region, and question-based cross-tabs (per your request).
 - Be statistically weighted to ensure the sample reflects the demographic and geographic distribution of Financial Advisors across Canada.
- A **PowerPoint-based report** can be provided for an additional fee, and will be delivered 1-4 business days after delivery of data tables, dependent upon report length.

For a nominal additional charge, you can receive a PowerPoint-based report, analysing the results.

Services included with Omnibus

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- **Survey design**

- Our **expert researchers** will consult with you about your research objectives, and will **design your survey questions for you**. Survey design will be conducted in collaboration with you, and the questions will not be finalized and fielded until they are approved by you
- Standard demographic and occupation-related questions are included in your survey free-of-charge

- **Public release amplification**

- If you are releasing your survey results publicly, we can help amplify your reach by posting your release and/or report to our **website and social media channels** (i.e. Twitter, LinkedIn, Facebook, Instagram).
- Our senior researchers can also act as **media spokespeople** for your public/media releases.

At no extra charge, Pollara will take primary responsibility for survey design, and amplify your media release (if applicable).

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Pricing

- **Pricing per question***

- Minimum buy of \$9,000 required
- \$1,500 per closed-ended question
- Item bank questions incur an additional charge of \$500 per item after 1st item in the battery/list
- \$2,500 per open-ended question

* Pricing encompasses all design, field, & data table services/deliverables

- **PowerPoint report**

- PowerPoint reports range from \$1,500 to \$3,000, dependent upon length of report

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Contact us with any questions,
or to subscribe:

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