

2018 U.S. Retail Direct Providers



RESEARCH OVERVIEW

Industry professionals can participate in Cerulli research through either topical research interviews or confidential surveys. In return, participants receive research findings or benchmarking reports for their participation. All information is aggregated to protect the anonymity of specific firms and respondents. Data collected is used across all Cerulli products.

TARGET AUDIENCE

Retail Direct Providers

For the purposes of this survey, Cerulli defines the retail direct channel as any sale of investments (e.g., mutual funds, ETFs, individual securities) to a retail client without the help of a traditional financial advisor.

LAUNCH

1Q 2018

SURVEY OVERVIEW

This survey measures the retail direct business landscape, including market sizing and recent flow activity. In addition, the survey will help providers benchmark the investors' product mix, trading levels, and account sizing.

This Initiative Explores these Key Industry Trends

- Products, services, and strategies that will drive future growth in the direct industry
- The sources of new client relationships
- The level of resources that are dedicated to marketing and advertising in the direct business

HOW TO PARTICIPATE

1. Register

Contact us or click the "Register Now" button below

[REGISTER NOW](#)

2. Complete

Interview participants

Research interviews will take 30–60 minutes to complete

Survey participants

Survey length varies, but typically takes 10–20 minutes to complete

3. Receive

Interview participants

Key Findings: Overview of the findings from our upcoming 2018 U.S. Retail Investor Products and Platforms report

Survey participants

Complimentary Research: A copy of a relevant issue of The Cerulli Edge

Benchmarking Report: Custom report of this survey highlighting your firm's responses in comparison to the survey aggregate

CONTACT US

For more information about this research initiative, contact: surveys@cerulli.com

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Cerulli Research Initiatives