

# CAVALIER ASSOCIATES

2017 CONTENT SURVEY

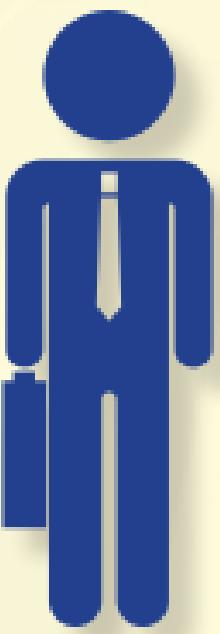
**INSIGHTS**

# DEMOGRAPHICS

2017 CONTENT SURVEY

**INSIGHTS**

CAVALIER  
ASSOCIATES

REVENUE FROM **LIFE INSURANCE****50.31%**

attribute up to 25% of their revenue to Life Insurance

**18.44%**

attribute up to 50% of their revenue to Life Insurance

**15.63%**

attribute up to 75% of their revenue to Life Insurance

**45.94%**

attribute up to 25% of their revenue to Assets Under Management

**16.56%**

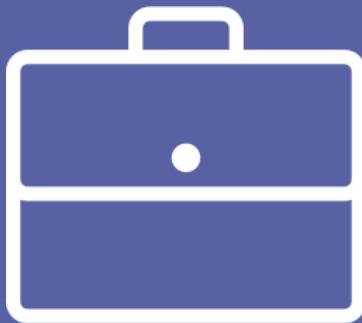
attribute up to 50% of their revenue to Assets Under Management

**13.13%**

attribute up to 75% of their revenue to Assets Under Management

REVENUE FROM **AUM**

# TRANSACTIONS PER MONTH



**50.63%** do **1-5** Life Insurance transactions per month

**18.44%** do **6-10** Life Insurance transactions per month

**8.44%** do **11-25** Life Insurance transactions per month

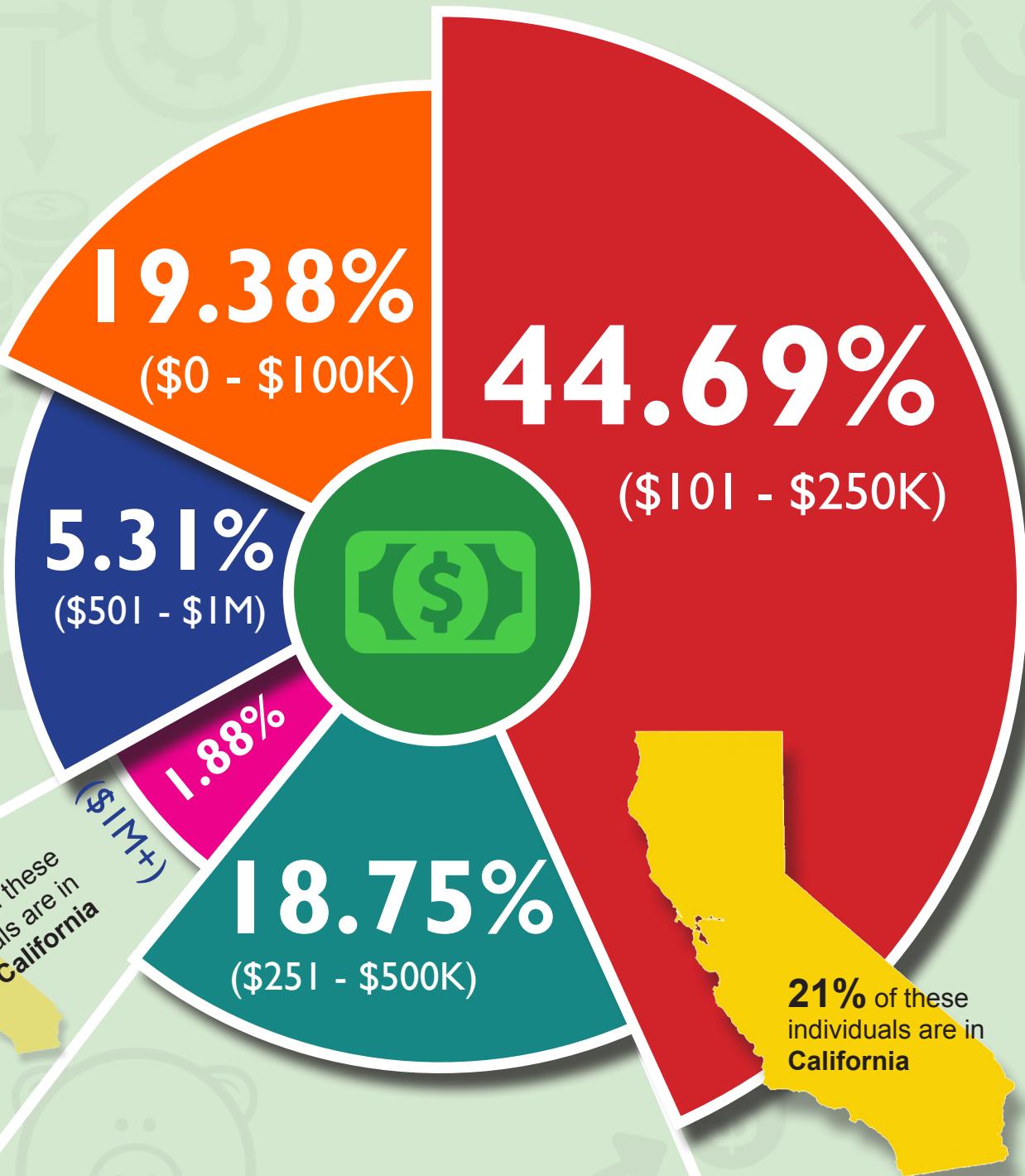


**53.44%**  
do **1-5** Long-Term Care transactions per month

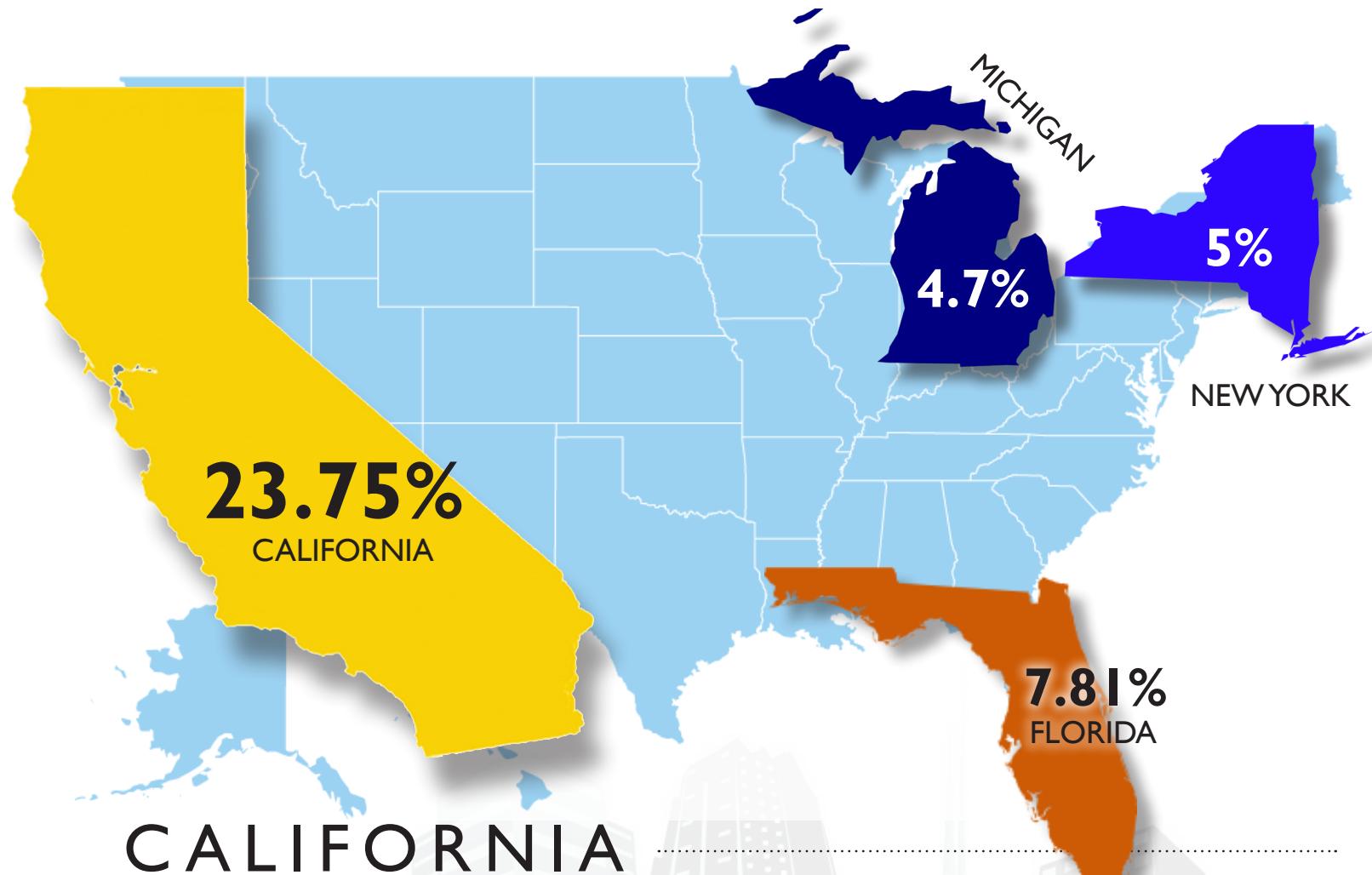


**38.44%**  
do **1-5** Disability transactions per month

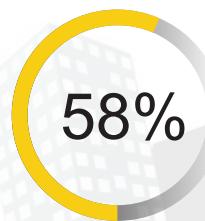
## AVERAGE CLIENT INCOME



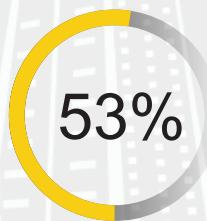
# GEOGRAPHIC DISTRIBUTION



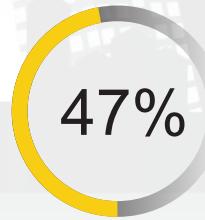
## CALIFORNIA



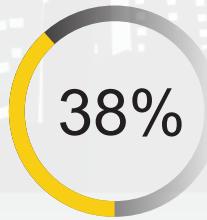
Are interested in  
Planning Solutions  
for *High Net Worth*



Are interested in  
Competitive Advantages  
to *Differentiate Yourself  
with Business Owners*



Are interested in  
*Business Succession  
Strategies*



Are interested in *Private  
Retirement Trusts*

# BEHAVIORS & PREFERENCES

2017 CONTENT SURVEY

**INSIGHTS**

CAVALIER  
ASSOCIATES

# FIRST TIMERS



**64.38%**  
are First-Time form fillers

**36.56%**  
have engaged with  
us for the 1st time

## HOW WOULD ADVISORS LIKE TO BE NOTIFIED OF AN EVENT?



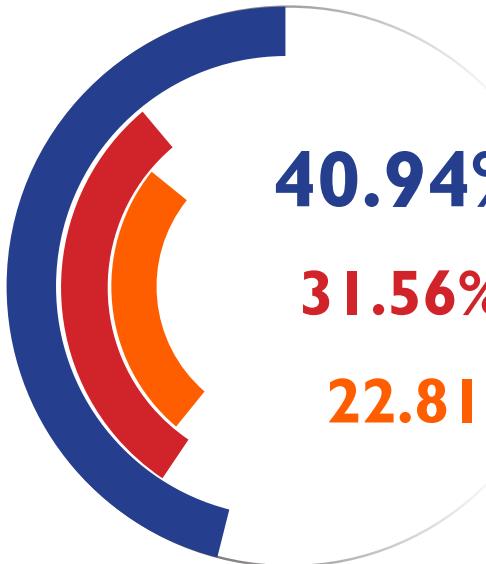
**90.94%** want to be notified of an upcoming event through **EMAIL**

**.63%** want to be notified of an upcoming event through a phone call



**.63%** want to be notified of an upcoming event through social media

## IDEAL LENGTH OF A WEBINAR

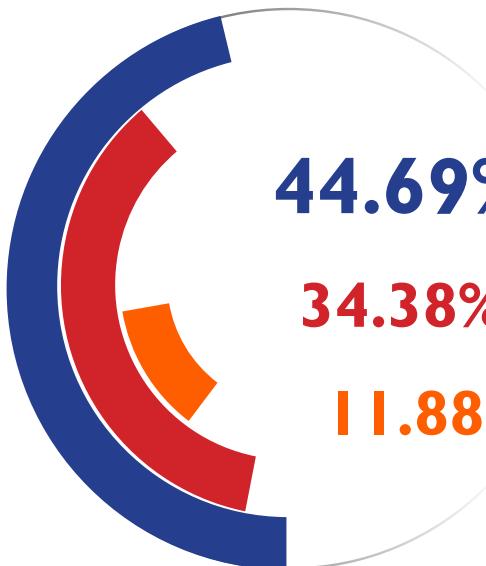


**40.94%** believed **30 minutes** is the ideal length

**31.56%** believed **45 minutes** is the ideal length

**22.81%** believed **60 minutes** is the ideal length

## FREQUENCY OF WEBINAR ATTENDANCE



**44.69%** would attend an event **Once a Month**

**34.38%** would attend an event **Twice a Month**

**11.88%** would attend an event **Every Two Months**

# ADVANCED PLANNING

## TOPICS OF INTEREST

**51.56%**

**Business Succession  
Strategies**

**55.31%**

**Planning Solutions  
for High Net Worth  
Clients**

**32.81%**

**Portfolio Optimization  
Theories**

**30.94%**

**Selling a Business  
for Real Estate for  
Little or No Tax**

# PRACTICE MANAGEMENT

## TOPICS OF INTEREST



**46.25%**  
**Competitive  
Advantages to  
Differentiate Yourself  
with Business Owners**

**40%**  
**How to Communicate  
with Business Owners**

**40.94%**  
**Marketing and Sales  
Strategies to Attract  
More Clients**

**29.06%**  
**The New Language  
of Life Insurance**

# TACTICAL

## TOPICS OF INTEREST

**37.81%**  
Hybrid Product  
Strategies

**35%**  
Advantages of  
Living Benefits

**32.81%**  
Optimizing  
Income with IUL

**40%**  
LTC and Chronic  
Illness Market