

Zeldis Trends and Thought Leadership Recent Experience

DOL Thought Leadership

- ✓ Online quantitative survey and qualitative bulletin boards with advisors to explore the perceptions of and concerns with the pending DOL regulations

Annuity Trend Research

- ✓ Online qualitative bulletin board discussions with advisors to explore trends in the annuity business, including sales strategies, product preferences and perceived future sales



Advisor Habits

- ✓ Online quantitative survey with advisors to explore the information sources and tools they use and to understand how they use social networking in their business

Investment Trend Research

- ✓ Online quantitative survey with advisors to explore trends in investments, tools and services, and perceptions of the investment industry

LTC Thought Leadership

- ✓ In-depth interviews with advisors and consumers followed by a large-scale online quantitative survey with consumers to explore perceived LTC needs and knowledge of LTC solutions