

Zeldis Customer and Advisor Journey Recent Experience

Defined Contribution Advisor Journey Research

- ✓ Telephone in-depth interviews with retirement advisors to understand the retirement plan sales process, including pain points, disruptors, and differentiators

Life Insurance Customer Journey Research

- ✓ Online quantitative survey with consumers to fully explore the journey of shopping for and purchasing life insurance



Life and Annuity Journey Research

Ongoing, telephone quantitative survey with annuity and life customers to understand the purchase, servicing, and claim process

Annuity Advisor/Owner Journey Research

- ✓ Telephone in-depth interviews with annuity advisors and owners to understand the purchase process for annuities, including decision drivers, pain points, and differentiators

Retirement Planning Journey Research

- ✓ In-person focus groups with mass affluent and high net worth consumers to explore the retirement planning journey