



Zeldis FinTech Case Studies



Crypto Exploration Research

Online qualitative followed by an online survey with crypto buyers aged 20-40 to understand their attitudes, practices, behaviors, preferred marketing channels, and psychographics

Results were used to inform advertising and communication targeted to users of crypto



Structured Products Research

Largescale, online survey with financial advisors who sell structured annuities and other structured products to explore whether a financial technology solution would improve sales

Results were used to improve client company's understanding of key barriers and where technology could help solve



Advisor Digital Portal Research

Qualitative bulletin board with retail FAs (and their marketing staff) to identify key needs and priorities in using a carrier portal, and how they currently use portals

Results were used to help client company understand how portals are used, and ways to optimize their portal to improve the user experience



Financial Literacy Concept Test

Online survey with mass affluent consumers to explore reactions to a personalized online financial literacy tool, including overall interest, likes, etc.

Results were used to determine the viability of the financial literacy concept, as well as potential changes to increase future uptake



Advisor-Facing Tech Research

Individual interviews with retail financial advisors who sell mutual funds, to learn more about the technology advisors use for portfolio management

Results were used to help the client company understand gaps they could potentially fill with new technology