

### June 2015

#### Health Insurance - US

This report will help you to uncover opportunities and understand the key issues affecting your market. How? By giving you instant access to analysis and critical recommendations. It will also challenge routine thinking by providing fresh, new perspectives that energizes your thought processes.

#### Personal Finance and Advice - US

The personal financial advice industry is changing rapidly. Robo-advisers are increasingly popular and the number of financial advisers is shrinking as more retire and fewer are hired to replace them. As a result, competition for advisory clients is increasing, and advisers have to find ways to differentiate themselves from one ...

### May 2015

#### The Role of Loyalty in Financial Services - US

"Loyalty efforts should not be kept a secret. FS providers can be up front and ask consumers about their loyalty, especially if these firms are providing great customer experiences. Customers who are given the opportunity to make a recommendation will be more likely to do so. Addressing consumers' concerns by ...

#### Retirement Planning - US

"There is a retirement planning crisis in this country. Whether because they can't, they don't know how, or they don't know they should, people are not saving what they will need even to be sure they won't outlive their savings. Tools are available to help, but many people don't utilize ...

### April 2015

#### The Role of Trust in Financial Services - US

"The FSI's (financial services industry) reputation has been damaged since the recession hit in 2008-09. Consumers quickly blamed the industry for the crisis and ever since have had a hard time trusting its products and services. However, not all sectors were negatively impacted; credit unions continue to attract more consumers ...

#### Millennials and Finance - US

"Millennials are young and in the beginning stages of establishing themselves, their households, and their families. Their needs at this time are quite specific and revolve largely on learning how to manage their day-to-day finances. Institutions that can best help them with these most fundamental are likely to be those ...