

# 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

## REVENUE FROM *AUM*



**45.94%**

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



**16.56%**

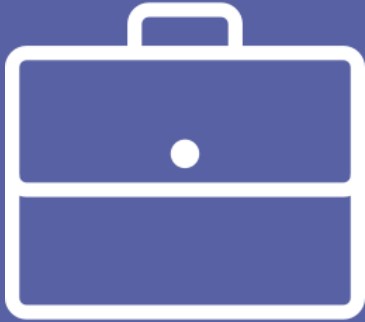
attribute up to 50% of their revenue to Assets Under Management



**13.13%**

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

# 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%**

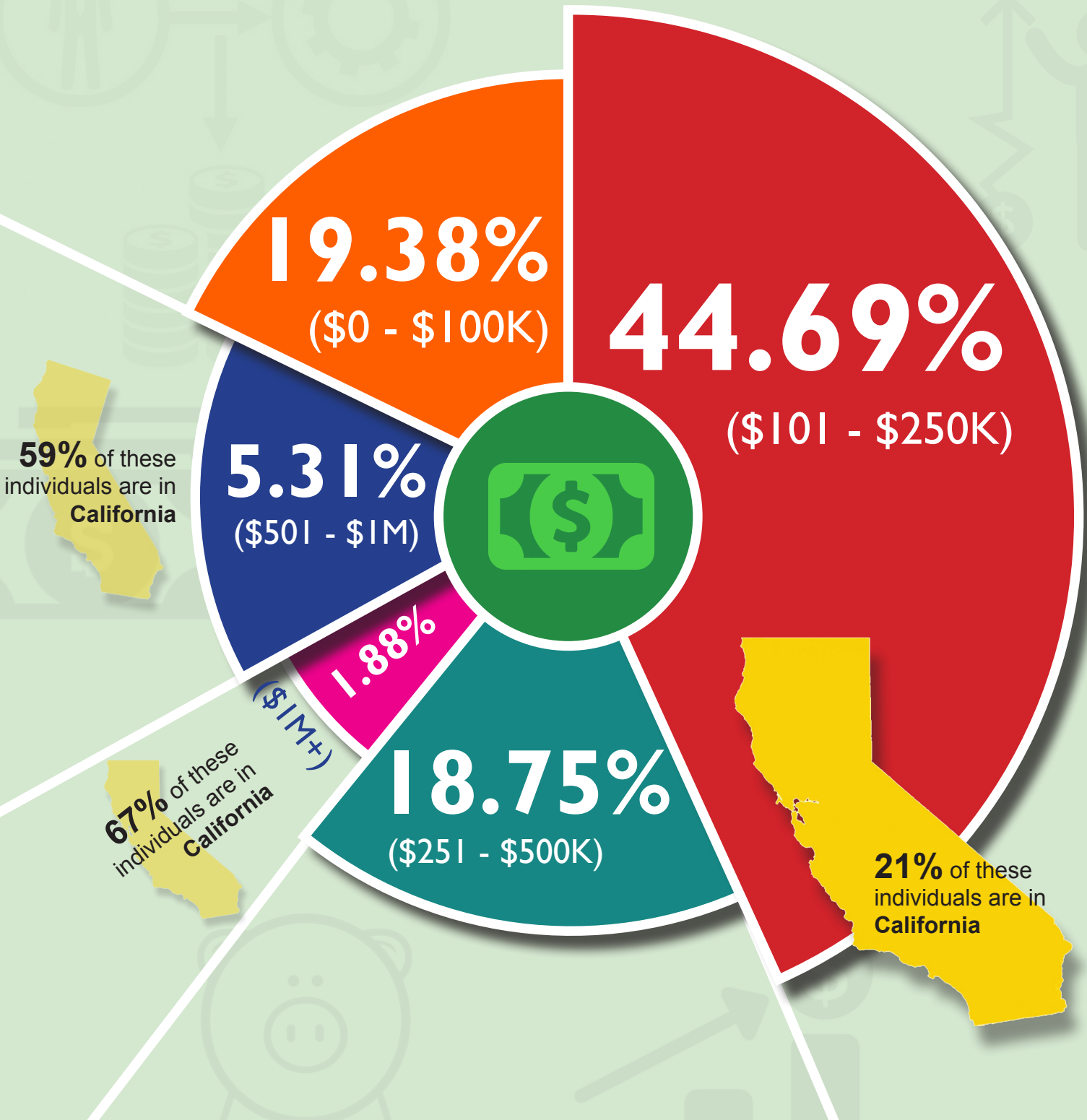
do *1-5* Long-Term Care transactions per month



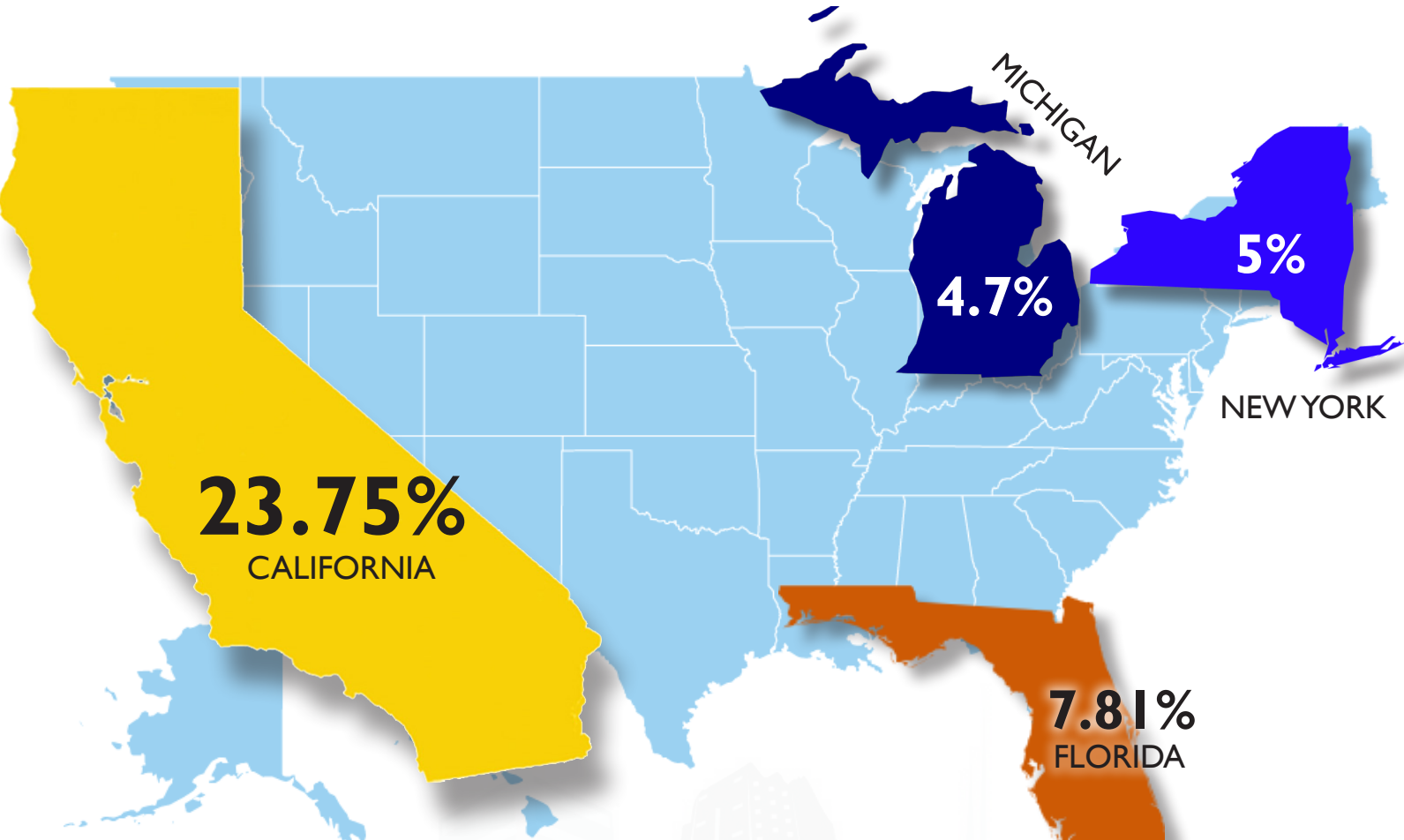
**38.44%**

do *1-5* Disability transactions per month

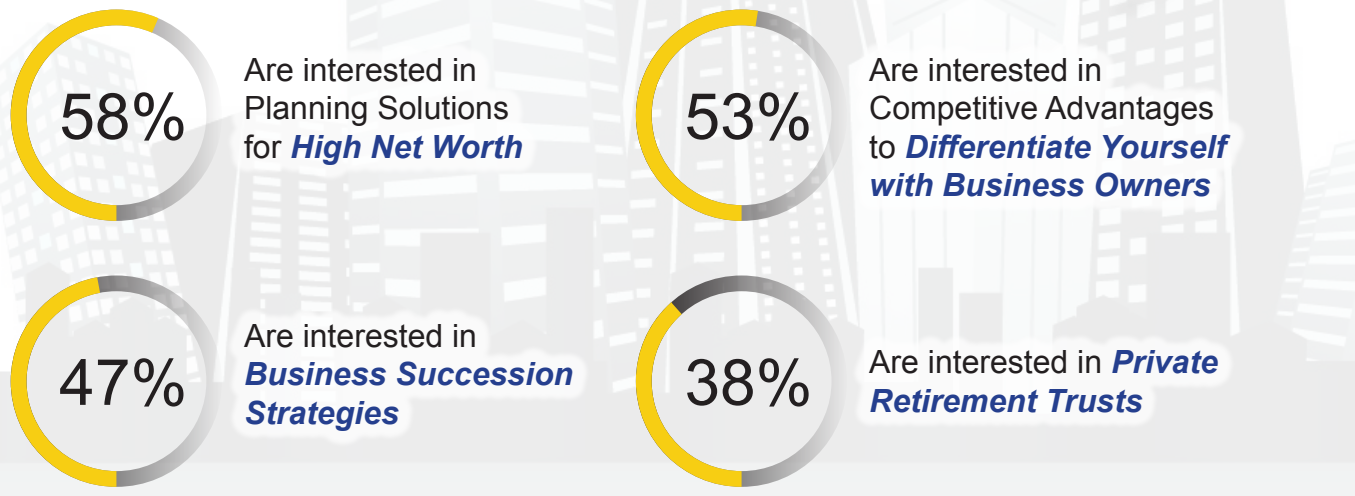
# AVERAGE *CLIENT INCOME*



# GEOGRAPHIC DISTRIBUTION



## CALIFORNIA



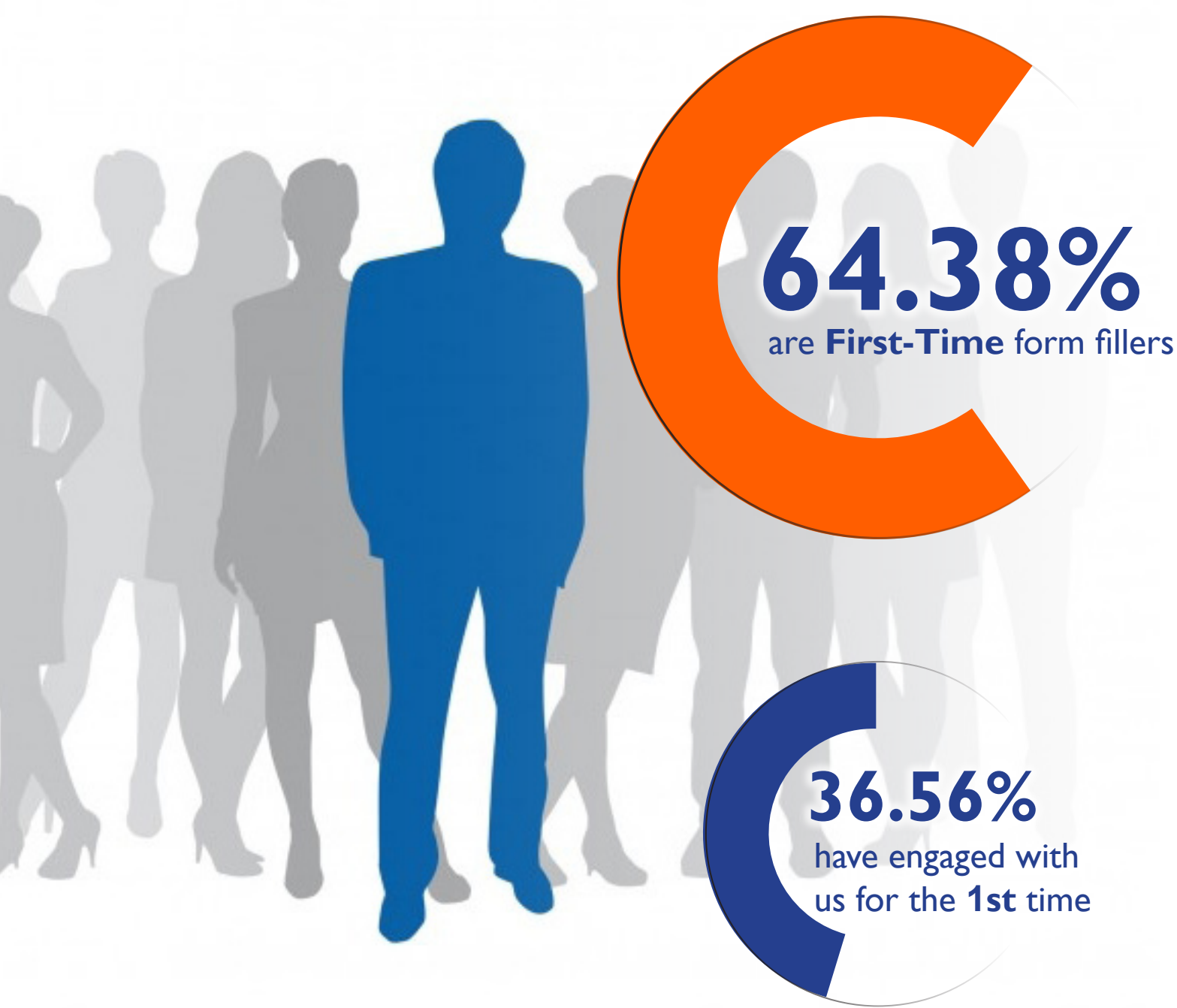
# BEHAVIORS & PREFERENCES

2017 CONTENT SURVEY

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CAVALIER  
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# FIRST TIMERS





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



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

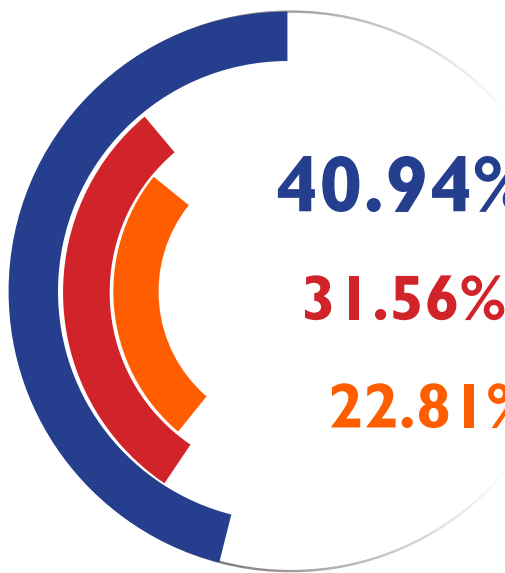
**.63%** want to be notified of an upcoming event through a phone call



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



## IDEAL LENGTH OF **A WEBINAR**

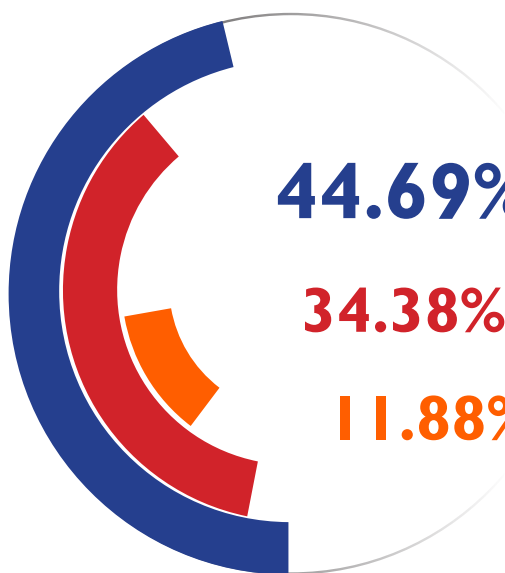


**40.94%** believed **30 minutes** is the ideal length

**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**

**30.94%**

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

**55.31%**

**Planning Solutions  
for High Net Worth  
Clients**

**32.81%**

**Portfolio Optimization  
Theories**

# **PRACTICE MANAGEMENT**

## TOPICS OF INTEREST

**46.25%**

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

**40%**

**How to Communicate with Business Owners**

**29.06%**

**The New Language of Life Insurance**

**40.94%**

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

# 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