Announcing Corporate Insight's New Syndicated Study...

Consumer Financial Education Today: Best Practices

For over 15 years, Corporate Insight has tracked the retail financial services industry, evaluating the customer experience firsthand. In that time, we've seen firms add a dizzying array of products and services, while developing cutting-edge websites to serve clients. These changes have mostly been for the better, but the industry hasn't always done a good job teaching consumers how to take advantage of the resources available to them.

Fortunately, firms are beginning to recognize that good educational materials can be good for business.

Institutions like Charles Schwab, Mass Mutual, TD Ameritrade and T. Rowe Price have all recently revamped their educational content, incorporating rich media into their websites to create a more engaging educational experience. The reason for this investment is clear: effective financial education empowers consumers and creates opportunities for firms to promote suitable products and services to them.

We feel that the improvements occurring in consumer financial education today represent the beginning of a significant trend, one that could help the financial services industry combat its negative perception. With this in mind, Corporate Insight recently decided to take a close look at online financial education to understand the state of the industry and to identify best practices. The fruits of our research will be presented this July in our new syndicated study, **Consumer Financial Education Today: Best Practices.**

Like last year's Social Media report, this study looks at firms from across Corporate Insight's coverage groups, highlighting effective education techniques from different industry segments. These best practices cover issues such as the use of rich media and educating young people about personal finance.

This report will include the following sections:

- **Executive Summary**
- **Historical Background** – Here, we will provide our perspective on the way online financial education has evolved over the past decade, drawing on our extensive *Monitor* research archive. This provides a useful context for understanding the state of the industry today.
- **Industry Overviews** – In this section, we describe the trends, leading firms and best practices in each of the segments we cover. That includes Annuity Issuers, Banks, Brokerages, Credit Card Issuers, Mutual Fund Companies and Retirement Plan Providers.
- **Vendor Reviews** – Here, we will assess the educational materials offered by leading third-party vendors like Lightbulb Press and SmartMoney.
- **Key Issues & Case Studies** – In this section, we will highlight critical best practices and key findings for a variety of educational issues, including:
    - ◊ Educating young people about personal finance
    - ◊ Home financing education in the economic crisis
    - ◊ Improving the educational value of interactive tools
    - ◊ Making credit education personal and relevant
    - ◊ Options education best practices
    - ◊ Retirement education best practices
    - ◊ Social media as an educational tool
    - ◊ Using rich media to enhance the learning experience
    - ◊ And more...

Consumer Financial Education Today: Best Practices will be released this July at a cost of $5,000. If you reserve your copy by June 30, however, we will reduce the price by 10%, to $4,500. Please contact **Jaclyn Silverberg at 212-832-2002 x127 or jsilverberg@corporateinsight.com** to reserve your copy now at this preferred price.

675 Third Avenue · New York, NY 10017 · 212.832.2002