



About Us

[Corporate Insight](#) provides competitive intelligence and user experience research to the nation's leading financial institutions. For over 20 years, the firm has tracked technological developments in the financial services industry, identifying best practices in online banking and investing, online insurance, mobile finance, active trading platforms, social media and other emerging areas. There are no assumptions in Corporate Insight's work – we use live accounts at all of the firms we track, providing our clients with unparalleled, unbiased competitive intelligence.

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Promote Your Firm's 2014 Gold Medals!

Corporate Insight is happy to assist all gold medal winning firms in promoting their honors. For more information and to see examples of past promotions, contact us at PR@Corporateinsight.com.

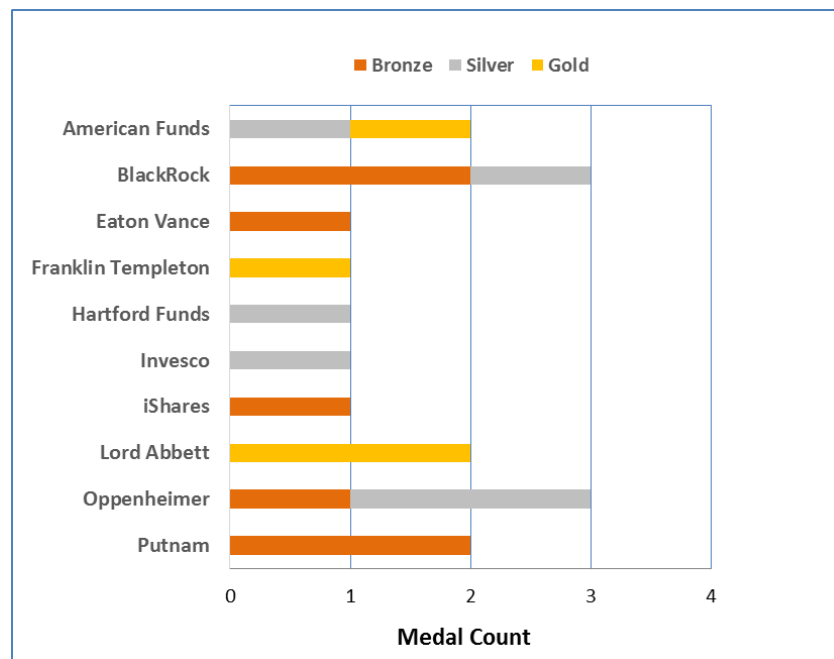
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Advisor Monitor Awards

This month, we present our 14th annual Monitor Awards report, in which we highlight the top website features in five categories: Homepage, Navigation, Value-Add Content, Literature Ordering Systems, and Thought Leadership. Top-performing firms are awarded gold, silver and bronze medals.

To review, the **gold medal** is reserved for offerings that provide an exceptionally valuable service. For features that offer similar value but lack some of the outstanding attributes and functions of the best offerings, we award a **silver medal**. For features that offer users an excellent or unique service, but do not meet the highest standards for a given category, we award a **bronze medal**.



Category Overview

- Advisor Homepage
- Value-Add Content
- Literature Ordering Systems
- Thought Leadership
- Navigation



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Navigation

We favor sites that offer conventional systems of universal site navigation, including efficient headers and footers, and cues as to where the user is within the site when looking at any given page, such as breadcrumbs. Additionally, search functionality was carefully considered, with leading firms providing value-added features, such as predictive search and ample result filtering options.



American Funds receives the gold medal following a full revamp of the advisor site. The firm provides a main menu with large, detailed, tabs. The firm organizes lower level content in a consistent design throughout the site, often utilizing vertical menus to guide users. The firm offers helpful breadcrumbs for location awareness. Search functionality is notable, with past searches stored to render future predictive searches, and a separate Fund Finder search option prominently displayed on the homepage. Additionally, the search engine result page features a clean interface with useful filters to help advisors further refine their query.

Value-Add Content

Here, we examine materials that asset managers provide for financial advisors to build business and manage operations. From tips for garnering referrals to advice on incorporating new technology into a practice, we focus on several aspects of the practice management experience including how accessible materials are, the breadth of topics addressed and any innovative or interactive features included on the sites.



LORD ABBETT®

Lord Abbett held onto its gold medal for offering excellent practice management resources through the firm's innovative Insights & Intelligence tool, which serves as a repository of information on high net-worth individuals and companies that advisors can search for potential business. The tool offers several search functions including wealth-creating events, industry news, retirement plans and foundations.

Literature Ordering Systems

Efficient literature centers provide advisors with ample resources for practice management, such as client-ready materials, including brochures, fund documents, and forms. The extent to which asset management firms are efficient and effective in distributing literature to advisors may play a large role in the ability to attract and engage potential and current clients. In this category, we examine accessibility, what kind of browsing capabilities are provided, shopping cart technology, order tracking, and literature descriptions.



Franklin Templeton retains the gold medal for an excellent literature center that continues to roll out enhancements. This year the firm added three new features that provide easier retrieval of literature resources, enhanced customizability, and narrower search options. A new scrolling menu highlights the most commonly used forms, a new My Literature History intra-page tab provides quicker access to recently viewed or downloaded items, and a dedicated search function focuses solely on retrieving literature. The dedicated literature search is especially welcome considering that the site's general search engine is relatively weak.

Thought Leadership

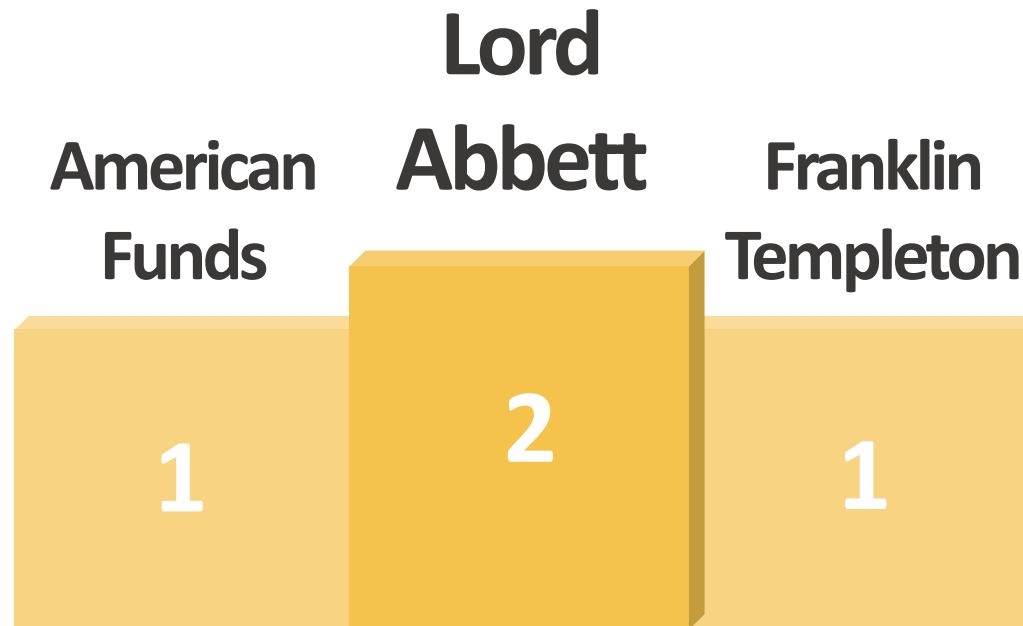
Providing market insights is a key service of asset management sites. We considered firms that publish regular commentaries that address a range of topical subjects and themes. While it is important for firms to advance opinions on broad economic conditions and outlooks, it is equally important to offer perspectives on specific products and timely investing topics.



LORD ABBETT®

Lord Abbett rose from a silver to a gold medal for offering one of the most visually-appealing commentary centers with equally appealing promotions, while covering a broad range of topics and themes. Commentaries are published and posted regularly and promoted on the firm's homepage through a carousel. The firm continues to provide excellent thought leadership that is produced on a regular basis and helps to showcase the insights of experts. New commentaries are offered in both video and text formats.

2014 Top Gold Medal Winners



Lord Abbett leads with two gold medals, followed by American Funds and Franklin Templeton each with one gold medal.

Contact Us

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