

2013 GOLD MONITOR AWARD WINNERS



ADVISOR

ABOUT CORPORATE INSIGHT

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 research, providing our clients with unparalleled, unbiased intelligence on the competition.

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CATEGORY OVERVIEW

1. Advisor Homepage
2. Navigation
3. Practice Management
4. Literature Ordering Systems
5. Commentary & Thought Leadership
6. Site Search



Promote Your Firm's 2013 Gold Monitor Awards!

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

ADVISOR HOMEPAGE

Putnam takes this year's Gold Monitor Award for the advisor homepage. The page effectively uses images to promote different Putnam services and products, and an efficient multi-column design allows access to the latest thought leadership from the firm, without overwhelming the visitor.



Putnam
INVESTMENTS

NAVIGATION

Oppenheimer redesigned its advisor site in 2013, greatly improving access to different site features and implementing a new, attractive main navigation menu. The new menu features flyouts that include large image promotions of site features and thought leadership. The main menu offers access to individual sections of each tab as well as overview pages.



OPPENHEIMERFUNDS™
THE RIGHT WAY TO INVEST

PRACTICE MANAGEMENT

Lord Abbett receives this year's Gold Monitor Award for practice management resources. The firm provides a centralized main menu tab that hosts practice management commentaries, seminar resources and the firm's innovative Insights & Ideas tool. The Insights & Ideas tool is a large database of businesses and individuals that advisors can browse to seek new business opportunities.



LITERATURE ORDERING SYSTEMS

Franklin Templeton takes this year's Gold Monitor Award for an easy-to-use literature center that makes good use of technology to help browsing. The firm includes rotating images and a banner of different document types that advisors can navigate to help find literature. Additionally, Franklin Templeton offers clear descriptions of resources to help advisor decide what materials to order.



FRANKLIN[®] TEMPLETON[®]
INVESTMENTS

COMMENTARY & THOUGHT LEADERSHIP

BlackRock earns the Gold Monitor Award for commentary and thought leadership. The firm produces new resources on a weekly and monthly basis and positions portfolio managers like Jeffery Rosenberg and Russ Koesterich as go-to leaders on issues like fixed income investing and the markets.

BLACKROCK

SITE SEARCH

Fidelity wins this year's Gold Monitor Award for providing an excellent advisor site search tool. The highly visible search bar predictively offers suggestions as a user types in search terms. The search results also include clear descriptions of site pages and PDF materials, and advisors can conveniently filter results by category and type, helping to find exactly the pages they need.



CONTACT US



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