

2013 GOLD MONITOR AWARD WINNERS



ANNUITIES

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. Public Homepage & Navigation
2. Public Education Resources
3. Public Product Information Offerings
4. Client Transaction Capabilities
5. Client Account Information
6. Client Statements
7. Advisor Tools and Calculators
8. Advisor Sales Materials
9. Advisor Illustration Systems



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.

PUBLIC HOMEPAGE & NAVIGATION

Transamerica excels in this category by offering a resourceful navigation menu that directs users to specific product offerings, thought leadership materials and performance data as well as offering a sleek and modern public homepage design.



PUBLIC EDUCATION RESOURCES

Transamerica earns a Gold Monitor award in this category by providing the most well-rounded annuity-focused public education resources. The firm offers all of the key criteria detailed for this category on their public website specifically with their mobile-friendly Personal Pension Strategy tool, their multimedia page and their general annuity education pages.



PUBLIC PRODUCT INFO OFFERINGS

Transamerica continues to excel in this category with its highly detailed and well-structured product pages, which also offer a number of resources to users.

Jackson National ranks high for this category as their product pages not only provide comprehensive information about each product but access to prospectuses, brochures, fact sheets and to a recently integrated Performance Center.



CLIENT TRANSACTION CAPABILITIES

Fidelity earns its first Gold Monitor in this category for its diverse selection of transactions and easy accessibility to them.



Jackson National returns as a leader in this category for its assortment of basic and advanced transactions on the private site.



MetLife receives a Gold Monitor award for a second year, as the firm provides a great selection of transactions.



CLIENT ACCOUNT INFORMATION

MetLife receives a Gold Monitor yet again due to having a high level of contract information in a well-organized layout.

TIAA-CREF returns to the category to receive a Gold Monitor award for a third year, as they continue to provide impressive client information offerings.

MetLife®



CLIENT STATEMENTS

Transamerica's account statement provides a high level of contract detail and fee transparency. Notable account information found within the statements includes a personal rate of return and an illustration of the client's current allocation model.

Jackson National's remains a leader in this category due to their visually appealing and organized statement layout that continues to offer clients ample contract and performance data along with good breakdown of fees and charges.



ADVISOR TOOLS AND CALCULATORS

Nationwide offers advisor tools and resources from centralized, easily accessible sections within their recently redesigned financial professional's site. In addition to their list of user-friendly retirement tools and calculators the new site highlights several tools directly on the homepage, thus, earning them a Gold Monitor award for this category.

Pacific Life offers one of the best selections of advisor tools and calculators among all the Annuity Monitor firms. The overall functionality and ease of use of all the resources garners the most effective online experience for financial professionals.



Nationwide®



PACIFIC LIFE

ADVISOR SALES MATERIALS

Allianz Life receives a Gold Monitor award for a second year due to their extensive amount of advisor sales and prospecting materials. The firm provides easy access to a deep array of retirement and annuity focused materials, including access to advisor-specific kits, brochures and presentations.



ADVISOR ILLUSTRATION SYSTEMS

AXA Equitable earns a Gold Monitor award for their well-designed illustration system. The firm provides multiple access points to the illustration system from the advisor homepage.



Jackson National utilizes an illustration system that includes a number of help features, earning them a Gold Monitor for yet another year.





CONTACT US

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