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RepThinkTank Debuts Distribution Dynamics Report Series

First Report Evaluates Product Usage among Financial Advisors and Delivers Guidance on Selection & Allocation Trends to Asset Managers

Boston, MA (August 24, 2010) – The RepThinkTank, a consulting alliance for the financial services industry, today announced the release of a new series of research reports under the *Distribution Dynamics* banner. The first report identifies and dissects financial advisor product usage trends and translates them into actionable tools for asset managers. The RepThinkTank is an experienced integrated team of leading industry professionals. The four firms in the consulting alliance - *Registered Rep.* magazine, FUSE Research Network, LLC, Momentum Partners, LLC, and The Oechsli Institute – support all of the key functional areas involved in investment product development and distribution.

This initial report goes right to the source - more than 1,000 financial advisors, from each of the primary distribution channels - to secure timely and insightful information about their business practices.

Distribution Dynamics provides a “deep dive” and significant insight into advisors’ investment selection processes and asset allocation practices. Key findings include:

- Which product structures (i.e. mutual funds, ETFs, closed-end funds) are used by different types of financial advisors and the products they expect to employ in the future
- How financial advisors allocate assets across investment objectives, how they plan to adjusted their allocation mix, including the use of alternatives, over the next 12 months
- Who advisors in the various channels (i.e. Wirehouse, Regional, RIA) view as the best investment managers in each of the major asset classes
- How financial advisors screen products so as to construct client portfolios including the reliance on home-office models and third-party resources

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“The distribution of investment products and services is becoming increasingly complex, requiring a more in-depth understanding of the needs of advisors,” Warren Bimblick, Senior Vice President, Strategy and Business Development for Penton Media, the publisher of *Registered Rep.* magazine. “This report series combines firsthand feedback from advisors with the distribution knowledge of RepThinkTank to provide asset management firms with actionable guidance for approaching each channel.”

Each report addresses a unique topic and is designed so that asset managers can easily access information by distribution channel. Recognizing that consolidation within the industry has begun to blur channel distinctions, each report also looks at trends that transcend channel lines to influence distribution strategies across the industry. The other topics to be covered in the *Distribution Dynamic* series will include Salesforce Effectiveness, Home Office Support and Brand & Positioning.

“One of the interesting findings to come out of this research is the degree to which advisors subscribe to the idea of a “new normal,” and how this belief is impacting their investment selection decisions,” said Neil Bathon, Founder, FUSE Research Network, LLC. “This has significant implications for how asset managers should market their products and services to advisors and home offices going forward.”

For additional information about purchasing the *Distribution Dynamics* report, please contact Jason Heinhorst, Partner, FUSE Research at jheinhorst@fuse-research.com and 720-221-5223.

For additional information about the RepThinkTank, please contact Rich Santos, Group Publisher, Wealth Management Group, Penton Media at rich.santos@penton.com and 212-204-4227.

About RepThinkTank

The RepThinkTank is an experienced integrated team of leading industry professionals. The four firms in the consulting alliance - *Registered Rep.* magazine, The Oechsli Institute, FUSE Research Network and Momentum Partners, LLC – support all of the key functional areas involved in financial services product development and distribution. This new model for delivering an integrated suite of advisory, consulting, research, and promotional services provides all of the tools and information leaders and executives need to take advantage of the highest value product and service development and distribution opportunities.

