



PUBLICATION TITLE ▼	FREQUENCY ▼
U.S. HIGH NET WORTH	
1 U.S. Private Banks & Trust Companies 2019: Evolving to a More Centralized Investment Approach	Annual
2 U.S. High-Net-Worth and Ultra-High-Net-Worth Markets 2019: Anticipating and Managing the Intergenerational Shift In Wealth	Annual
3 Cerulli Lodestar - U.S. Bank Fiduciary Assets	Ongoing
U.S. INSTITUTIONAL	
4 U.S. Institutional Marketing and Sales Organizations 2019: Deploying Resources and Analytics for the Acquisition and Retention of Client Assets	Annual
5 U.S. Insurance General Accounts 2019: Analyzing Continued Demand for Investment Income and Nonaffiliated Asset Management Services	Annual
6 North American Institutional Markets 2019: Evaluating Changes Across Client Types and the Resulting Demand for More Customized Investment Services	Annual
7 U.S. Outsourced Chief Investment Officer 2019: What's next for the industry?	Annual
8 The Cerulli Edge - U.S. Institutional Edition	Quarterly
U.S. INTERMEDIARY	
9 U.S. Intermediary Distribution 2019: High-Impact Value-Added Programs	Annual
10 U.S. Broker/Dealer Marketplace 2019: Value Levers—Technology, Planning, and Practice Management	Annual
11 U.S. Advisor Metrics 2019: Digitally-Empowered Advisors	Annual
12 U.S. RIA Marketplace 2019: Consolidators Gain Momentum	Annual
13 The Cerulli Edge - U.S. Advisor Edition	Quarterly
14 Cerulli Lodestar - U.S. Intermediary	Ongoing
U.S. INVESTOR	
15 U.S. Retail Investor Products and Platforms 2019: Constructing Sustainable Platforms	Annual
16 U.S. Retail Investor Advice Relationships 2019: Scaling Personalized Advice	Annual
17 The Cerulli Edge - U.S. Retail Investor Edition	Quarterly
18 Cerulli Lodestar - U.S. Retail Investor	Ongoing
U.S. MANAGED ACCOUNTS	
19 U.S. Managed Accounts 2019: The Challenge of New Platforms	Annual
20 The Cerulli Edge - U.S. Managed Accounts Edition	Quarterly
21 Cerulli Lodestar - U.S. Managed Accounts	Ongoing
U.S. PRODUCT DEVELOPMENT	
22 U.S. Alternative Investments 2019: Leveraging Technology for Retail Distribution	Annual
23 U.S. Annuity Markets 2019: Adapting to Financial Planning Trends	Annual
24 U.S. Subadvisory Markets 2019: Understanding the Nuances of Due Diligence Processes	Annual
25 U.S. Exchange-Traded Fund Markets 2019: Innovating for the Investor	Annual
26 U.S. Environmental, Social, and Governance Investing 2019: Meeting Evolving Investor Expectations	Annual
27 U.S. Product Development 2019: How New Product Offerings Impact Product Organizations	Annual
28 The State of U.S. Retail and Institutional Asset Management 2019: Recognizing Opportunity Across Client Segments	Annual
29 The Cerulli Edge - U.S. Asset and Wealth Management Edition	Monthly
30 The Cerulli Edge - U.S. Monthly Product Trends Edition	Monthly
31 Cerulli Lodestar - U.S. Investment Product Trends	Ongoing
U.S. RETIREMENT	
32 U.S. Defined Contribution Distribution 2019: Opportunities for Differentiation in a Competitive Landscape	Annual
33 U.S. Retirement End-Investor 2019: Innovation in Retirement Income Solutions	Annual
34 U.S. Retirement Markets 2019: Convergence of the DC and IRA Markets	Annual
35 The Cerulli Edge - U.S. Retirement Edition	Quarterly
36 Cerulli Lodestar - U.S. Retirement	Ongoing



PUBLICATION TITLE ▼	FREQUENCY ▼
GLOBAL	
37 Global Markets 2019: Bringing Clarity to an Uncertain World	Annual
38 The Cerulli Edge - Global Edition	Monthly
ASIA	
39 Asian Distribution Dynamics 2019: Compete, Collaborate, Consolidate	Annual
40 Asset Management in Southeast Asia 2019: The Welcome Mat Unfurls Further	Annual
41 Asset Management in China 2019: Setting Right Strategies	Annual
42 ETFs and ESG 2019: Assessing the Impact and Potential	One Time
43 Asian Retirement Markets 2019: Eyeing the Golden Nest Egg	One Time
44 Institutional Asset Management in Asia 2019: Balancing Niche and One-Stop Solutions	Annual
45 Asian Insurance Industry 2019: Gearing for Regulatory Complexities	Annual
46 The Cerulli Edge - Asian Monthly Product Trends Edition	Monthly
47 The Cerulli Edge - Asia-Pacific Edition	Quarterly
EUROPE	
48 European Alternative Investments 2019: The Evolving Integration of ESG	Annual
49 European Insurance Industry 2019: Uncovering Outsourcing Opportunities	Annual
50 European Distribution Dynamics 2019: The Road to Success	Annual
51 European Environmental, Social, and Corporate Governance Investing 2019: ESG: Spreading Its Roots	Annual
52 European Institutional Dynamics 2019: Addressable Opportunities for Asset Management	Annual
53 Asset Management in Switzerland 2019: Scale the Peaks of Success in the Alpine Nation's Growing Asset Management Market	One Time
54 European Marketing and Sales Organization 2019: Harnessing Technology to Win Business	Annual
55 The Cerulli Edge - Europe Edition	Quarterly
56 The Cerulli Edge - European Monthly Product Trends Edition	Monthly
LATIN AMERICA	
57 Latin American Distribution Dynamics 2018	Annual

**Report release dates and titles are subject to change.*

Included with Purchase

Research Publications

- Hardcopy and digital color copy
- Online access (unlimited per firm)
- Exhibits in Excel
- Key findings
- Analyst support
- Interactive Report Dashboard
- Executive Summary Video

Lodestar Subscriptions

- Online access for one year
- Unlimited firm-wide access
- Continuous data updates
- Analyst support
- Tablet compatibility
- Export data into Excel, PDF, and image formats

Bundle Discounting

Gross Spend	Discount
\$400,000+	30%
\$250,000-\$399,999	25%
\$125,000-\$249,999	20%
\$50,000-\$124,999	15%

Strategic Consulting

Cerulli's strategic consulting combines our expertise in research and data collection, industry-focused thought leadership, and 25 years of experience to provide our clients with targeted guidance on their most important strategic issues.



CERULLI
ASSOCIATES

Research | Analytics | Consulting

+1 617-437-0084
info@cerulli.com
www.cerulli.com