

Methodology

This report is comprised of eight research projects: seven online surveys and a set of focus groups.

Adviser Surveys:

A random selection of advisers was taken from current Australian telephone directories, both city and regional and as such is a representative sample of Australian financial planners (with the exception of bank-based employees). Advisers were contacted by telephone and emailed individualised web links to the surveys. All surveys were administered via the internet. Incentives were offered to elicit adviser participation.

Wealth Insights Platform Survey April 2007

A total of **409 financial advisers** completed this survey. The objectives of this survey were to measure advisers' opinions of platforms and to assess the levels of brand familiarity, brand equity and brand attributes for platforms.

Wealth Insights Adviser Survey May 2007

A total of **892 financial advisers** completed this survey. The objectives of this survey were to measure advisers' attitudes and behaviour towards a wide range of topics, and to assess the levels of brand familiarity, brand equity and brand attributes for platforms.

Wealth Insights Fund Manager Survey May 2007

A total of **680 financial advisers** completed this survey. The objective of this survey was to measure advisers' use of fund managers and asset classes.

The objectives of the following surveys were to measure advisers' attitudes and behaviour towards a wide range of topics:

Three additional surveys were conducted in May 2007:

- A total of **443 financial advisers** completed the Adviser Attitudes Survey.
- A total of **449 financial advisers** completed the Adviser Behaviour Survey.
- A total of **212 financial advisers** completed the Industry Trends Survey.

Wealth Insights Adviser Survey June 2007

A total of **303 financial advisers** completed this survey.

Adviser Focus Groups:

Five focus groups of between six and eight financial advisers each were conducted in Sydney during March and May, 2007. Advisers were selected at random to participate in focus groups and represent a broad cross-section of adviser backgrounds. Incentives were given to advisers that participated.

All groups were independently conducted and records kept ensuring accurate recall of opinions.