

## AITÉ GROUP RESEARCH & CONSULTING SERVICES

Aite Group understands the challenges faced by financial services industry professionals and responds accordingly. Through data-driven research, consulting, and advisory services, Aite Group works with its clients as a partner, advisor, and catalyst, challenging their basic assumptions and ensuring they remain at the forefront of industry trends. Aite Group's unique research and consulting is based on a holistic, three-pronged approach:

<b>Business strategy</b>	Analyzing the evolution and impact of business strategies in financial services
<b>IT innovation</b>	Identifying the latest technologies and their impact on the financial services industry
<b>Regulatory issues</b>	Evaluating the influence of rules and regulations on the financial services industry

### RESEARCH

Aite Group research is comprehensive in nature, offering clients insight into financial institutions, their customers, and the technology vendors that support them.

Through a subscription to one of Aite Group's six financial services subscription segments —

- Health Insurance*
- Institutional Securities & Investments*
- Life Insurance*
- Retail Banking*
- Wealth Management*
- Wholesale Banking*

— clients have access to in-depth, cutting-edge research reports presenting trend analysis, qualitative and quantitative market data, market sizing and projections, and much more.

Aite Group's research undertakings include:

**Advisory calls:** Aite Group consultants can provide advisory services over the phone, following a predetermined agenda to meet the specific needs of the client.

**Client-driven research agenda:** The agenda for research generally extends over the upcoming three to six months, and Aite Group's analysts continually interact with clients to ensure research topics are aligned with clients' most current and urgent needs.

**Direct, unlimited analyst access:** Clients are encouraged to contact analysts directly to ask questions or help apply report topics and data collected from research to support their strategy and initiatives. Direct, unfettered analyst access is unique to Aite Group and remains a cornerstone of the service they provide to their clients.

**Qualitative and quantitative data-supported findings:** Aite Group strives to use the most relevant instrument for each topic covered, from qualitative interviews with individuals to focus groups to end-user surveys.

### CONSULTING SERVICES

Aite Group provides timely, strategic business consulting services to mission-critical projects. Its industry experts function as consultants, serving clients in a timely, cost-effective manner.

Sample consulting offerings include:

**Benchmarking and gap analysis:** Aite Group consultants help vendors and financial services institutions identify differences between current and ideal performance. From product and industry benchmarking to identifying market, product or competitive gaps, Aite Group helps clients reach their desired outcome.

**M&A Advisement:** Aite Group can assess strategic and market implications of potential acquisitions and assist companies looking for strategic growth opportunities.

**Market sizing/Competitive analysis:** Clients that need to estimate the viability of a given market rely on Aite Group to assess over-all market opportunities and conduct in-depth competitive analyses to determine market entry potential. Aite Group also provides strategic partnership recommendations and, in many cases, introduces the parties.

**On-site strategy sessions:** For those looking for focused, one- to two-day strategy sessions on a given industry topic, Aite Group consultants can lead the discussion, facilitating actionable results and recommendations.

**Speaking engagements:** Aite Group analysts boast extensive experience speaking at industry events locally and globally, including Sibos, SIFMA, ACORD LOMA, TradeTech, and Global Private Banking.

**White papers/Presentations/Webinars/Social media input:** Aite Group consultants can deliver informative, comprehensive white papers, presentations, blog posts, and articles to meet the diverse needs of all market participants.

**Vendor evaluations and selection:** Aite Group consultants help financial institutions identify, evaluate, and select the best vendors and solutions by assisting in the RFI/RFP process.