NAPA Advisor Research Institute (NARI)

NARI OVERVIEW

OFFERING AT-A-GLANCE

Research and insights on retirement plan advisors are surprisingly scarce. Industry leaders often rely on speculation and anecdotes as they work to understand the advisor community. To address this knowledge gap, NAPA – in partnership with the Retirement Leadership Forum (RLF) – has formed the NAPA Advisor Research Institute (NARI). NARI's mission is to provide new insights into retirement focused advisor practices and their product and service preferences.

> **I need data and insight that helps me run my business. How are other firms that look like me servicing clients? What new roles and types of talent are they investing in?**
> *- NAPA APEX Roundtable Advisor*

> **In order to provide products and services that advisors must have to be successful, my firm needs data on critical advisor trends.**
> *- Senior Product Manager*

RESEARCH TOPICS

Each year, NARI's research agenda will be focused on the trends and topics making the largest impact on the retirement advisor community. Based on current feedback from top retirement plan advisors, 2024's research will focus on:

- Succession planning and developing next generation leadership
- Service model scale and efficiency
- The convergence of retirement, wealth, and health
- Attracting and retaining top talent

Behind the scenes, the research will be driven by detailed quantitative analysis of semi-annual advisor survey data and augmented by more qualitative focus groups and one-on-one interviews. This will ensure that NARI's research is always up to date on current advisor thinking and is supported by a continuous flow of new data.

2024 RESEARCH DELIVERABLES

Research reports will be delivered quarterly in February, April, September, and November.

Quarterly reports will be augmented with a "voice of the advisor" newsletter that will share early insights from our ongoing research.

SUBSCRIPTION INFORMATION

HOW CAN I USE THE RESEARCH?

- Create products and services that are aligned with advisors' evolving, real-world needs
- Improve advisor segmentation to target best-fit advisors
- Build strategies to serve the next generation of retirement advisors
- Identify characteristics of advisors that lead to the highest levels of growth and profitability
- Understand the views of advisors on emerging products

WHY SHOULD I SUBSCRIBE?

NARI's data and insights are unlike any other source of industry information. With a membership of more than 17,000 retirement plan advisors, NAPA is uniquely positioned to tap into the pulse of the retirement advisor community. NARI will provide information found nowhere else.

Furthermore, subscribers can establish themselves as champions for advisors by backing essential research. This support will enable advisors to enhance their practices and improve the overall efficiency of their operations.

CONTACT

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