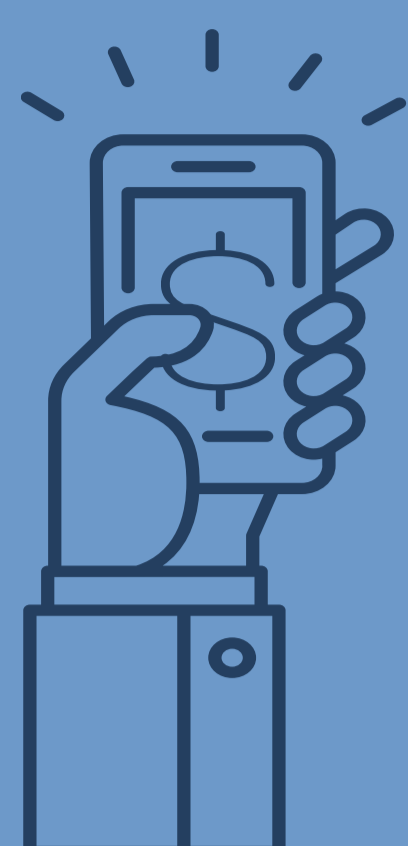




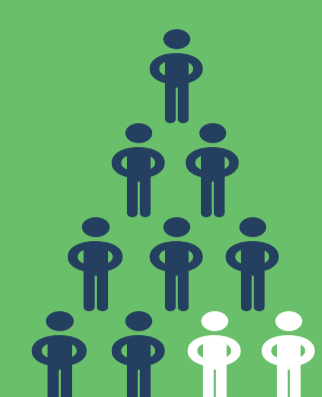
Tapping into  
the Financial  
Frontier



## Stay Connected...

What was once  
considered the "Mobile  
Trend", is now the  
"Mobile Movement"

69% of digital media time is  
spent on mobile devices  
- comScore (2017)



Over 8 in 10 internet users will  
use a smartphone to access the  
web regularly in 2017  
- eMarketer (2017)



86% of smartphone users time  
is spent in apps (14% in  
browser)  
- eMarketer (2016)

## What is Mobile InSIGHT?

DALBAR's Mobile InSIGHT rates  
and ranks account-related...

And

reports on trends and best  
practices for

Mobile Optimized Sites + Mobile Apps



- Retirement Plans
- Mutual Funds
- Life Insurance and Annuities

## How Does Mobile InSIGHT Benefit Me?



Our reports pinpoint what's  
trending and who's who in the  
implementation of the latest and  
the greatest mobile capabilities.



Stay on top of your competition  
so you don't fall behind.



Prioritize future  
enhancements



Make the case for future  
enhancements

## What's Trending in 2017?

**+ -** More Estimation  
**x =** Tools

It's now easier than ever for mobile users to  
estimate their retirement income or figure out  
how much life insurance they might need.

**🤖** Getting Human

Artificial intelligence is here as firms provide  
ways to become more human by offering  
virtual assistants and chat features.

**🎯** Targeted Education

Educational resources are more  
relevant to the individual user since  
firms are now linking them to the user's  
personal situation.

**🔒** Beefing up Security

Firms' ever-increasing priority on  
security is evident with two-factor  
authentication now becoming the  
norm.

**🔓** Unfettered Access to  
Account Balances

The option to view account balances  
without logging in keeps information  
even closer to mobile users' fingertips.

**⚖️** App vs. Site

Apps are being redesigned to look more  
like the firm's site, but this change  
brings both pros and cons.

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