



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 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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