

Changing the Face of Financial Wellness

Prudential's Insights-led Initiative

March 2020

Prudential Decision Insights Group

1027975-00001-00



Prudential

Our Mission

Help our customers achieve financial prosperity and peace of mind

Living the mission

In 2000 Prudential created the Signature Series to:



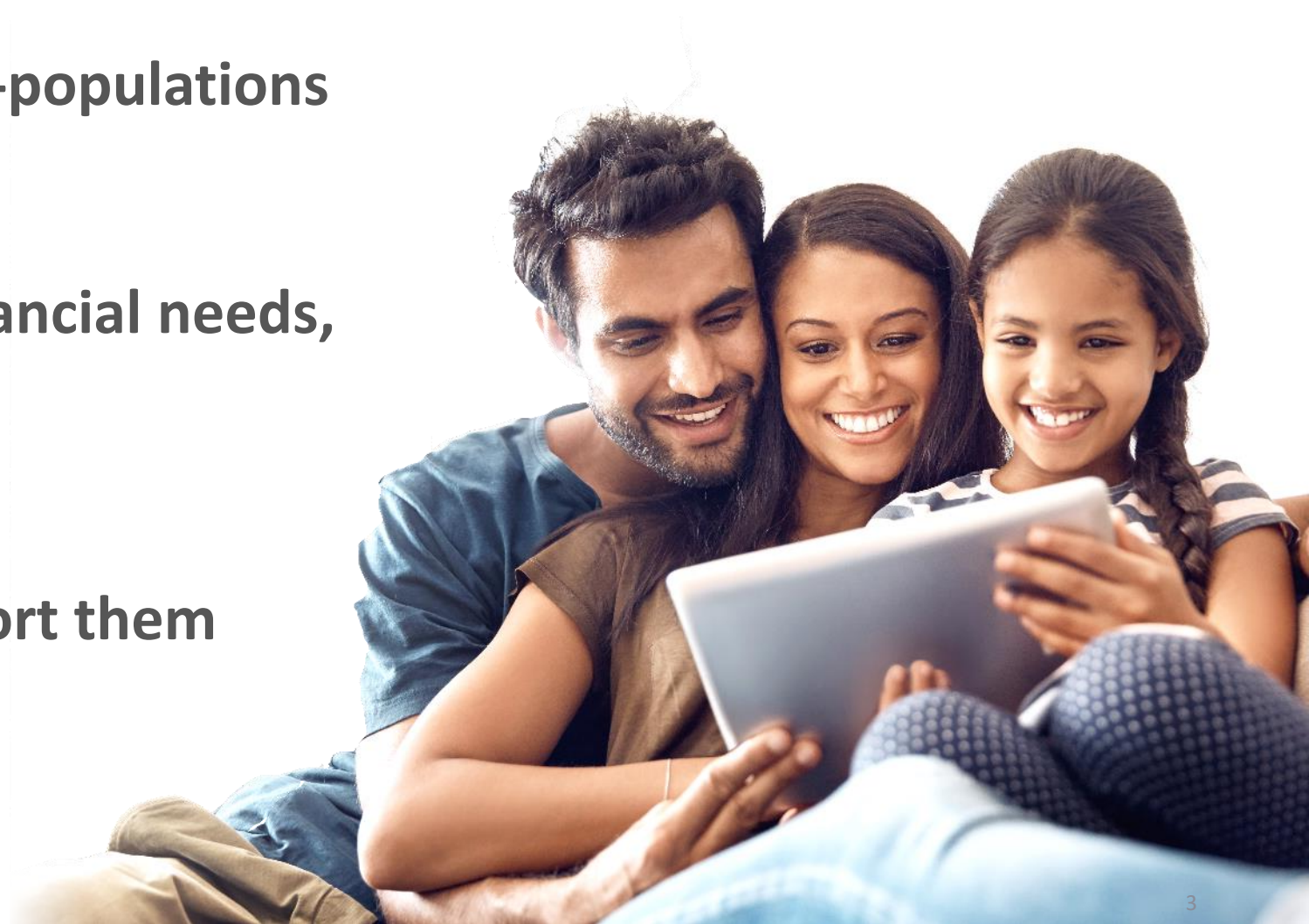
Gain insight into US sub-populations



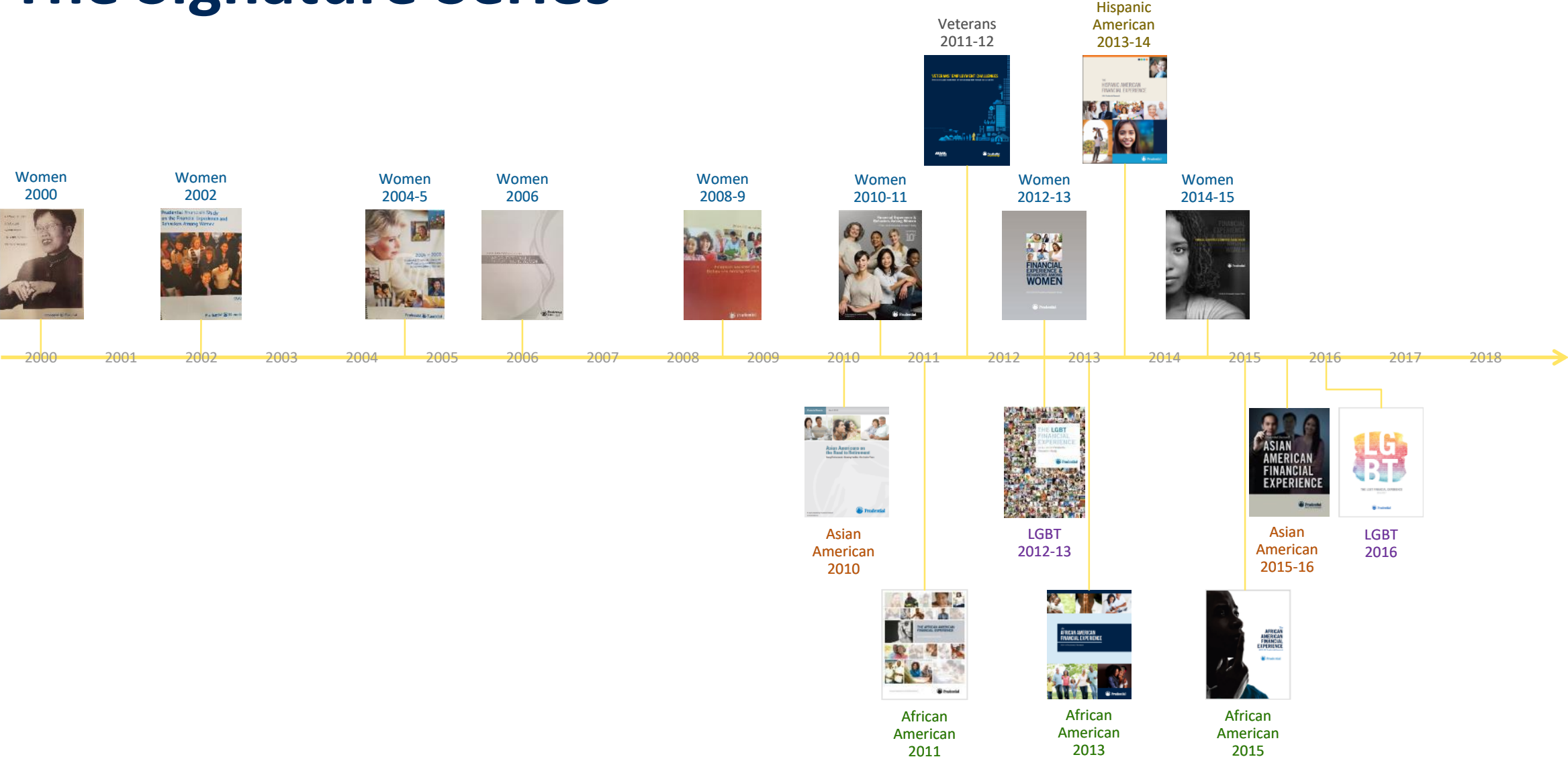
Explore their unique financial needs, attitudes and goals



Learn how to best support them



The Signature Series



Building a better model

A more frequent, sustainable, cost-efficient thought-leadership program that maximizes:

- **Breadth:** Larger set of sub-populations, including non-demographically defined
- **Depth:** Deeper insight into each
- **Flexibility:** In topics covered and analysis
- **Empowerment:** Insights delivered in ways that educate and inspire



Breadth

EXAMPLES OF GROUPS CAPTURED IN OUR INCLUSIVE NEW APPROACH



Depth

- Financial goals & progress to-date
- Knowledge gaps, challenges & concerns
- Financial decisions & behaviors
- Financial product ownership
- Savings, assets & debt
- Sources of financial info & advice
- Relationships with financial advisors
- Profiling characteristics
- Objective & subjective financial wellness





Flexibility

- Flexible modules
- Many potential survey cuts and comparisons

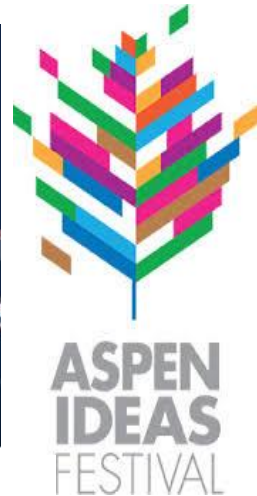
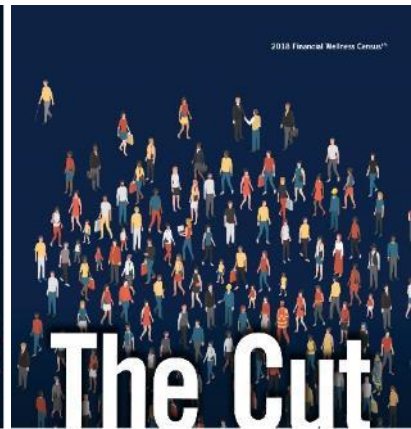


Empowerment

- Consumer insight to guide decisions
- Tableau dashboard
- Insights immersion Day

The Financial Wellness Census (Wave 1)

- Gain understanding of key business targets
- White papers and sales support
- Content for brand activation and conference presentation
- Executive talking points



FINANCIAL SURVEY





Financial Wellness Census 2020

- Track changes over time
- Incorporate new modules that are relevant to external and internal stakeholders
- Address new audience cuts that are increasingly of interest

... Stay Tuned!



Thank you!

**What questions do
you have?**