

# Finance Decision Makers & Brokers

## I TARGET:

Finance Profs & Brokers

## I MARKET:

US

## I METHODOLOGY:

60-Minute Telephone/ Web IDI

## SPECS:

- Employer Sponsors (DMs at companies responsible for selecting retirement plans like 401(k)s and/or life insurance and supplemental insurance like Aflac, etc) from companies of 1,000+ across the US
- Roles like Director of Benefits, Head of Group Benefits or Total Rewards, plus other executive HR/Finance roles
- Respondents should be familiar with Transamerica but not currently using Transamerica
- Brokers who sell mutual fund products to individuals
  - Must possess sales licenses like Series 6, 7 or 63
- Brokers who sell annuities to individuals
  - Must possess sales licenses like Series 6, 7 or 63
- Brokers who sell employee benefits to employers
  - Employers must have 1,000+ employees
- Brokers who sell retirement plans to employers
  - Employers must have 5,000+ employees
- Employer decision-makers who select providers for retirement plans for employees
  - Must have 1,000+ employees
- Employer decision-makers who select providers for benefits like life insurance, supplemental health insurance for employees
  - Must have 1,000+ employees

## SAMPLE PROFILES:

- Senior Vice President at Chesapeake Regional Healthcare
- Senior Director at SMU
- Senior Vice President at Altus Group
- Senior Director at Autism Learning Partners