

BROKERAGE EXPERIENCE BENCHMARK

Competitive insights to shape your digital future

Corporate Insight's Brokerage Experience Benchmark is the only annual study that provides an unbiased assessment of 20 leading brokerage firm digital platforms from the perspective of the actual end user. Our proprietary grading criteria and analytical framework are based on over a decade of research in this space, giving you a clear view of how the nation's top brokerage firms' digital platforms stack up against each other in terms of design, navigation, functionality and usability. With this definitive guide to the best brokerage firm digital platforms, you receive:

- Rankings of 20 leading brokerage firm websites and mobile apps
- Identification of leading players in every category
- Insights into best-in-class digital experiences, with illustrative screen shots
- Analysis of your top digital strengths and weaknesses versus the industry
- The confidence to prioritize the most important digital developments

The Brokerage Experience Benchmark is a must-have resource for any brokerage firm that wants to create a digital experience that delights current users and helps to acquire new customers.



The Experience Benchmarks address several pain points for brokerage firms:

| PROBLEM | SOLUTION |
|--|--|
| "We want to know how to position our strengths versus peers in the marketplace" | CI's Experience Benchmarks will objectively show where your strengths are relative to the competition |
| "Fighting for budget is always a challenge – we need objective data to build the case for investment" | Benchmarks provide tangible evidence of your competitive gaps |
| "It's hard to set priorities when we don't know the size & importance of our gaps, and where things are going" | Our data is weighted to reflect cardholder importance/usage; analysis calls out key industry trends |
| "We need KPIs to see if what we're doing is really moving the needle" | Each firm receives overall and category scores; annual data refresh lets you track your progress over time |
| "Our competitors are getting higher satisfaction scores for digital than us and we're unsure how to respond" | Benchmarks reveal competitors' strengths & provide recommendations to improve your digital CX |

Brokerage Experience Benchmark Framework

CI analysts evaluate eight categories to separately assess the website and mobile platforms:



Account Information



Research & Tools



Prospect Experience



Account Servicing



Profile & Settings



Design & Navigation



Trading



Support

Benchmark Set

- Ally Invest
- Ameriprise
- Charles Schwab
- Citi Self Invest
- Edward Jones
- E*TRADE
- Fidelity
- JPMorgan SDI
- Merrill Edge
- Merrill Lynch
- Morgan Stanley
- Raymond James
- RBC
- Robinhood
- SoFi
- TIAA
- UBS
- U.S. Bancorp
- Vanguard
- Wells Fargo Advisors



For more information on the Brokerage Experience Benchmark including our Custom Experience Benchmarking option, contact us:
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