

ABSOLUTE ENGAGEMENT'S

2026 CLIENT INTELLIGENCE MONITOR

Client Sentiments and Signals that drive engagement and growth

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The wealth management industry has never been accused of having a shortage of client data. While we may be 'data rich,' many firms still lack the deeper insights needed to drive meaningful engagement, loyalty and growth.

The **2026 Client Intelligence Monitor** is designed to help you think differently about client data and insights, offering a new lens into how clients think and feel. It is designed to help you measure where you are today, and plan to deliver a more connected and engaging experience in future.

Since 2009 Absolute Engagement has captured data from high-net-worth clients, to understand how their needs are evolving and the impact on client experience and growth.

In 2026, the data was collected, via online survey, from 1,000 respondents between February 28 and March 9 with a 3.1% margin of error. All respondents work with a financial advisor, meet specific household investable asset thresholds and have some involvement in financial decision-making. This report includes tracking data since 2020. See Appendix One for methodology and a respondent profile.

Over time, our research has forced a shift in how we think about the connection between client data, client experience and, more recently, how AI is being utilized by advisory firms.

- 1 There is an emerging recognition that the most progressive firms are not only focused on delivering an efficient experience, but an **engaging** experience.
- 2 An engaging experience is one that not only delivers on expectations but **ensures that each client feels seen, heard and understood.**
- 3 To ensure clients feel seen, heard and understood advisory firms need to **capture, track and use data that reflects how they are thinking and feeling.**
- 4 That data, and the associated insights, is the **foundation of an effective AI strategy.**



The Great Data Shift

Prior to 2020 the focus of our research reflected the traditional metrics used to assess success (such as satisfaction and Net Promoter Score), as well as the inputs to support great service, such as expectations and preferences. That has evolved.

In 2020, Absolute Engagement went into field with this research on March 10, capturing data as the world was shutting down due to the global pandemic. It became apparent that 'feelings are data' as we watched, in real time, the impact of confidence on how clients felt about their advisory relationship.

It was, of course, an extraordinarily difficult time, but put a spotlight on the critical importance of capturing and tracking data on how clients are feeling, in real time. As importantly it put a spotlight on the connection between positive feelings of confidence and desired Outcomes such as loyalty, satisfaction and referrals.

From that point on, Absolute Engagement redefined the client data we capture to include how clients are feeling - more client intelligence than client data. If your goal is to deliver an engaging experience, we believe that you also need to capture, track and use client intelligence intentionally and consistently.

The Client Intelligence Equation

At Absolute Engagement we believe that most firms are missing a client intelligence layer that includes a longitudinal view of client Sentiments (e.g., satisfaction and perceived value) and Signals (e.g., confidence and concerns). And we know that by capturing, tracking and using meaningful client intelligence, wealth management firms can drive loyalty, referrals and growth.

The equation is simple and yet powerful. Client Sentiments and Signals combine to create meaningful client intelligence. And client intelligence can be harnessed and used to drive engagement, loyalty and growth.



Industry Report Card



So how is the industry doing? Absolute Engagement is giving the industry a solid 'B-', reflecting strong satisfaction, meaningful gaps in perceived value, confidence and referral activation, and lurking retention risks.

Below is a summary of the key indices included in Absolute Engagement's Client Intelligence Equation. You'll find detailed responses for each, along with trending data and insights on what this means for the industry on the following pages.

Index	Definition	Score	Summary
Sentiments			
Satisfaction Index	Measures overall satisfaction with the relationship.	93	Advisors continue to deliver strongly on core service expectations.
Net Promoter Score	Measures likelihood the client will refer, as a reflection of the strength of the relationship.	57	There is strong advocacy, while revealing that willingness to refer does not necessarily translate into actual referrals.
Value Index	Measures perceived value provided, relative to fees paid.	80	There is lurking risk based on perceived value relative to fees paid.

Index	Definition	Score	Summary
Signals			
Self-Confidence Index	Measures client security, confidence, clarity and control when thinking about their financial future.	87	Overall confidence is relatively strong but a third of clients need additional support.
Concern Index	Measures overall client concern on a range of specific topics.	65	Clients demonstrate confidence about their future while still experiencing some anxiety in the present.
Outcomes			
Engagement Index	Measures client advocacy, combining satisfaction and referral behavior.	35	There is a clear opportunity to go beyond satisfaction and drive deeper engagement among clients.
Loyalty Index	Measures likelihood client will continue working with their advisor.	92	While most clients will stay, there are underlying risks masked by inertia.
Referral Activation Index	Measures success is translating engagement into referrals.	46	There is a persistent gap between client satisfaction and actual referral behavior.

Sentiments, Signals and the Global Pandemic

The **2026 Client Intelligence Monitor** includes trending data since 2020, a year none of us will easily forget. It is clear that the global pandemic impacted how clients feel about the future, their level of anxiety and, importantly, their relationship with their advisor. We can see a downward pressure on key indices during, and following, the pandemic and a steady increase over time. This is a stark reminder that external events, particularly those that meaningfully impact the lives of clients, can have an impact on advisory relationships.

Using the Client Intelligence Monitor: From Benchmark to Action

- 1. Benchmark your current experience.** Use the indices in this report to evaluate the current state of your client experience. Look beyond satisfaction, to assess the balance between Sentiments, Signals and Outcomes. The combination of these metrics creates a more complete picture of relationship health. Firms with high satisfaction but lower perceived value, confidence or engagement may be carrying more hidden risk than they realize.
- 2. Identify missing client intelligence.** Many firms are rich in transactional and behavioral data but light on emotional and relational insight. This report is intended to help identify some of the data points you may be missing and to highlight the ways in which that data becomes exponentially more valuable when captured longitudinally. The ability to understand how clients are feeling, and how those feelings evolve over time, creates a foundation for a more engaging and personalized experience and effective AI-driven engagement.
- 3. Operationalize insight into action.** Data only creates value when it changes behavior. The firms that benefit most from client intelligence are not simply measuring sentiment, but are embedding insight into everyday decisions, workflows and conversations.

You'll find ideas on how to take action on the results in the Taking Action section of this report.

Longitudinal Data as a Competitive Moat

In this report we are sharing industry-level data to provide a benchmark. This is a good place to start, but not a good place to stop. Benchmarks are compelling both as a point of comparison and an important signal of change. However, having this data for each client, each advisor and your firm, as a whole, will provide the client intelligence you need to drive engagement and growth.

As the industry doubles down on leveraging AI to drive both efficiency and engagement, the power of longitudinal client-level data becomes apparent. Understanding how clients are feeling, how those feelings are evolving and if and how those Sentiments and Signals differ between couples and within families is a true differentiator and driver of value.

The future is about the value of longitudinal insights at the prospect and client level (as individuals or couples).

“ Before you can use data, you have to capture it. Consistently. Completely. Across every household, every interaction, every life event. Otherwise, the AI layer being built on top of it is operating on an empty foundation.

The firms that get this right first will have something that can't be replicated. A longitudinal record of client relationships that compounds in value the longer it runs. Unlike technology, which any competitor can license next quarter, proprietary client data is structural.

AI is the multiplier. But you can't multiply zero.



Matt Brinker
Managing Partner
Merchant Investment Management



“While the Client Intelligence Monitor provides a clear industry benchmark, this is only part of the equation. Real differentiation is not about how you compare to the industry but about access to client-level longitudinal insights that reflect not only who they are (demographics) and what they do (fund flows) but how they think and feel as individuals, between couples and within families. While we bemoan challenges with data integration, a more fundamental risk is that we don’t have access to the right data.”



Julie Littlechild
 Founder & CEO
 Absolute Engagement

SENTIMENTS

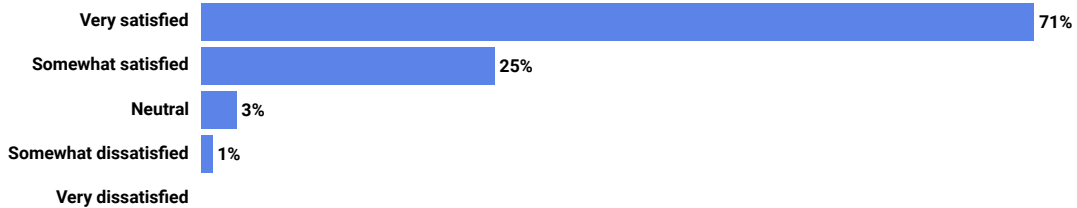
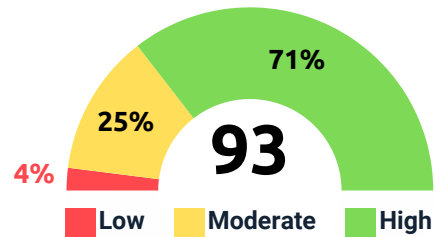
Client Sentiments answer a key question. How are you doing in delivering a meaningful experience to your clients across the organization? Specifically, Sentiments measure the extent to which your experience reflects client expectations and preferences.

Overall client sentiment is both strong and steady, particularly through the lens of client satisfaction and Net Promoter Score. Perceived value highlights some cracks in the foundation.

Satisfaction Index

The **Satisfaction Index** is a reflection of the extent to which the firm is meeting or exceeding the core service expectations of clients. We consider satisfaction a lagging indicator of risk and, in 2026, five percent of clients were identified as being high risk. Because satisfaction is generally high in the industry, we consider ‘somewhat satisfied’ to represent a moderate risk.

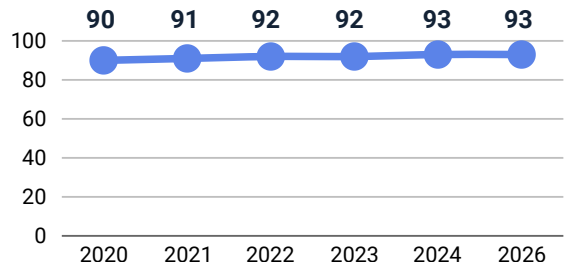
Overall satisfaction is high as advisors continue to meet or exceed core client service expectations.



Please rate the overall level of satisfaction with your financial advisors.



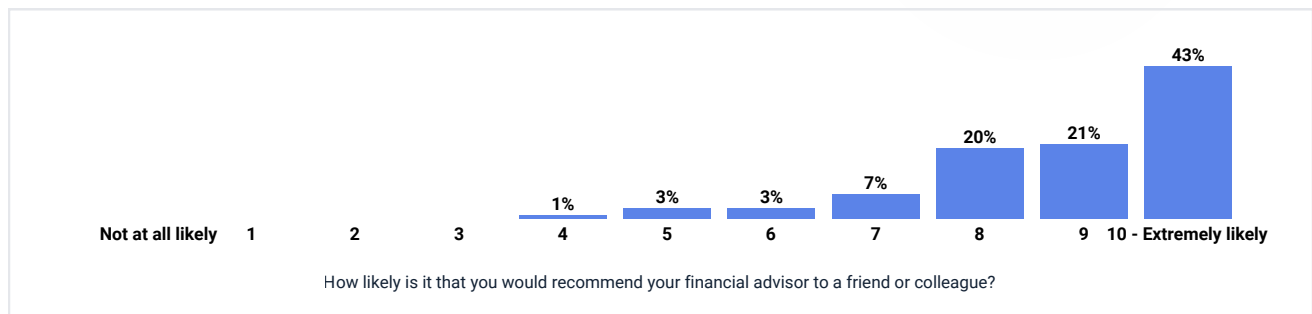
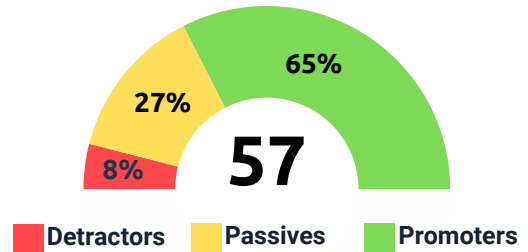
Since 2020 overall satisfaction has been both consistent and high. There was a drop in 2020 which we saw consistently across key metrics in the early stages of the pandemic. That year, 90% of clients said they were somewhat or very satisfied, increasing to 95% in 2026.



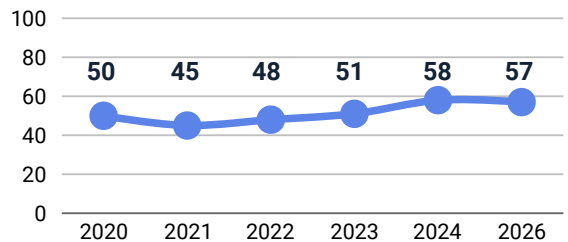
Net Promoter Score

Net Promoter Score (or NPS) answers the question of how likely a client is to refer a friend or family member. It was designed, if viewed over time, to be a reflection of the depth of client relationships.

Clients are willing to refer their advisor, but willingness doesn't necessarily translate into action.



Like satisfaction, Net Promoter Score has been relatively consistent over the last five years. The pandemic appears to have impacted NPS on a lagging basis, dropping from 50 in 2020 to 45 in 2021 and then increasingly steadily to 57 in 2026.



Interpret NPS with caution

While it is tempting to view 'detractors' as being at risk, use caution in interpreting NPS results.

- 56% of Detractors were somewhat (44%) or very (12%) satisfied with the relationship; 87% of Passives were somewhat (60%) or very (27%) satisfied with the relationship.

Similarly we should not interpret NPS data to suggest that a promoter will refer, but rather that they are willing to refer. They cannot know if they will uncover referral opportunities.

- 43% of Promoters provided a referral in the last 12 months, dropping to 25% for Passives and eight percent for detractors.

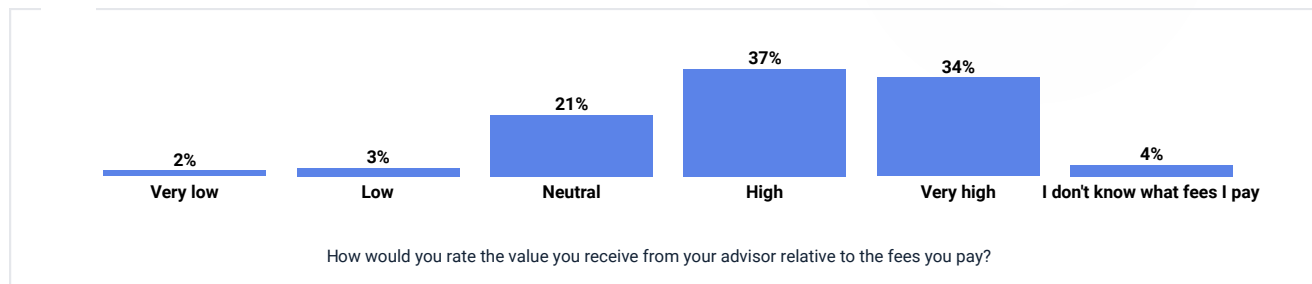
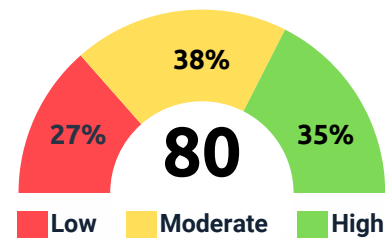
As the data shows, there is a correlation between NPS categories and both satisfaction and referral activity, but it is not exact. It is, therefore, best to view NPS trends over time rather than make assumptions about individual clients.

One of the benefits of NPS is that it is widely used. SurveyMonkey data suggests that NPS, within financial services, breaks down as follows: lower quartile: 34, median, 59 and upper quartile 80. Bear in mind that the definition of financial services is quite broad. Among Absolute Engagement's large RIA clients, for whom we track NPS, the average is closer to 86.

Value Index

Value examines the perception of value received compared to the price paid, and is an indicator of lurking risk. While the definition of 'value' can be defined differently from one client to the next, this metric evaluates overall perception. Four percent of clients indicated they did not know what fees they paid and could not respond to the question; previous research has demonstrated that many clients may also be wrong about the fees they pay. There is an indication of lurking risk because only a third of clients rate value as very high. There is always risk when perceived value is not a top box score.

There is lurking risk based on perceived value relative to fees paid.



While value will be measured going forward this was not included in previous surveys so no historical comparison is provided.

SIGNALS

If Sentiments measure how you are doing in delivering on client expectations, Signals assess how your clients are doing. More specifically Signals paint a picture both of how clients are feeling about their financial future and the things that keep them up at night. They are not only a measure of how clients are feeling today, but a signal as to how those feelings are changing or being challenged.

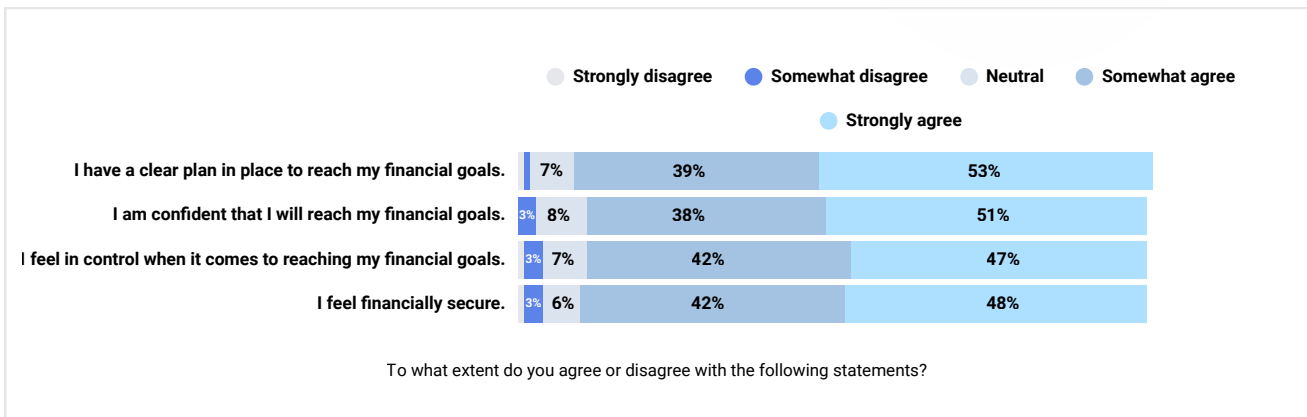
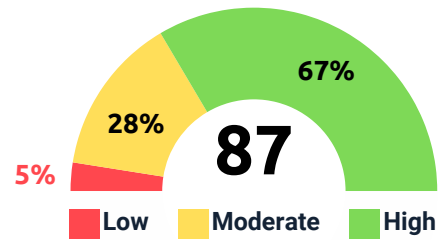
Overall, client Signals highlight strong self-confidence, along with relatively high concerns, providing advisory firms with an opportunity to add significant value.

Self-Confidence Index

The **Absolute Engagement Self-Confidence Index** is a proprietary measure of how clients are feeling about their financial future. It was created using data gathered in this study and was found to be strongly correlated with satisfaction, loyalty and Net Promoter Score. We consider the Self-Confidence Index a leading indicator of risk because it alerts advisors to deeper concerns. We know, from our research, that when clients feel more confident in their financial future, a positive halo effect is created relative to the advisory relationship.

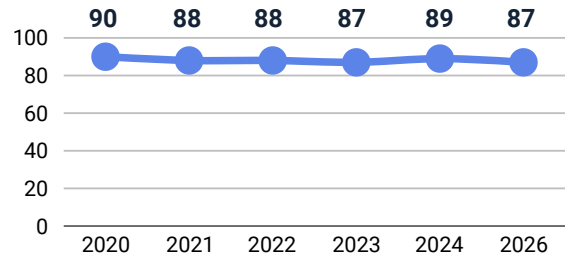
The overall Self-Confidence Index provides a trend over time, which is helpful if considered against external factors, such as economic or political uncertainty. By breaking the Index into its component parts and measuring at the client level, we can see 'cracks' in confidence at an individual level, which allows advisors to go deeper with individual conversations.

Overall confidence is relatively strong but a third of clients need additional support.





The Self-Confidence Index has been relatively consistent since 2020, but has declined slightly from a high of 90. That decline is driven primary by decreased feelings of 'control' and 'financial security.'



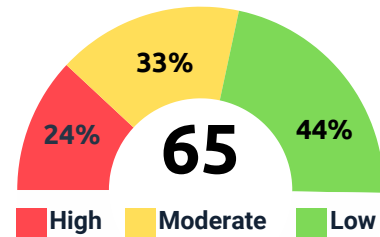
A Caution. Industry research necessarily invites input from one person in a household and that is typically the person who drives much of the financial decision-making. However, data captured through our Engagement Engine highlights differences in both Self-Confidence and Concerns between couples. This suggests that both indices may be artificially high while creating an opportunity for deeper conversations and meaningful support.

Concern Index

The **Absolute Engagement Client Concern Index** is a proprietary measure of the level of concern or anxiety clients are feeling related to a set of key concerns. Note that the specific concerns may change from year to year.

Confidence is more about the future - a 'rational' reflection of the strength of the plan. Concerns are more about today - an 'emotional' reflection of the challenges we all face. While an overall Index is a helpful lens, individual circumstances, age and wealth play a significant role in driving concerns. Overall, younger clients are more concerned about a wider range of issues.

Clients can feel confident about their future while still experiencing some anxiety in the present.



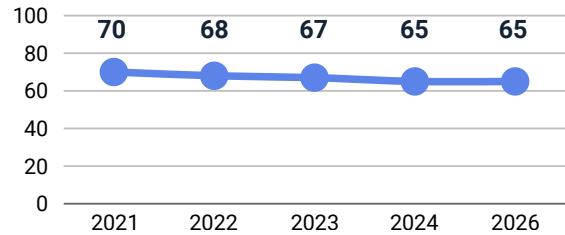
● Not at all concerned ● Not very concerned ● Neutral ● Somewhat concerned ● Very concerned

Concern	Not at all concerned	Not very concerned	Neutral	Somewhat concerned	Very concerned
Caring for elderly parents or family members	24%	15%	12%	28%	21%
Supporting my parents in managing their financial affairs when they are older	32%	14%	12%	21%	21%
Understanding the signs and implications of cognitive decline with family members	5%	16%	19%	39%	21%
Ensuring my family is taken care of when I pass away	14%	20%	13%	27%	26%
Managing our financial life should my partner/spouse pass away first	18%	20%	14%	28%	21%
Personal or family health	4%	13%	14%	40%	29%
Managing personal or financial stress	12%	25%	17%	28%	18%
Ensuring my children make good financial decisions	13%	14%	13%	31%	29%
Personal job security	33%	21%	14%	17%	15%
Having enough money to retire comfortably	16%	23%	10%	29%	22%
Dealing with the rising costs of health/long-term care	5%	13%	11%	39%	33%
Whether I will feel fulfilled in retirement	17%	23%	13%	29%	19%
The impact of market volatility on my ability to reach my long-term goals	4%	15%	15%	40%	26%
Saving for my child/grandchild's education	24%	19%	16%	23%	18%
Not having a clear vision for my life when work is optional	24%	25%	19%	19%	12%

How would you rate your level of concern with each of the following right now?



The Concern Index has come down since 2021 when higher levels were anticipated. Note that concerns differ dramatically by age group so segmentation of data in your business is key.



OUTCOMES

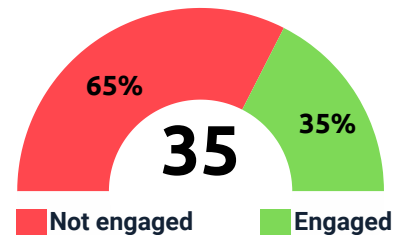
Engagement, loyalty and growth are the Outcomes of driving the Sentiments and Signals higher, with the caveat that concerns need to be addressed but are harder to drive down. Outcomes reflect the return on investment for enhancing both service and engagement. The data shows a clear connection between increasing satisfaction, Net Promoter Score, perceived value and confidence on key Outcomes including engagement, loyalty and referrals.

Engagement Index

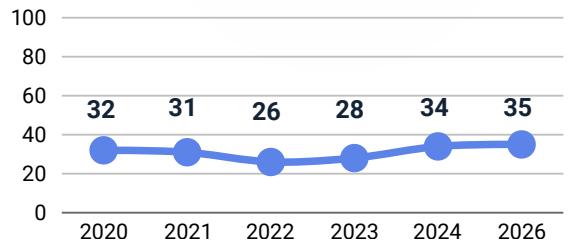
The **Engagement Index** reflects client advocacy, and identifies the proportion of clients who are very satisfied (5 out of 5) and have provided a referral in the past 12 months. They not only feel good about the relationship but are advocates for the business. More than that – they have taken action.

Engagement is an aspirational metric because not all clients will refer. This is not a metric to be posted on a website or shared with clients, but understood, analyzed and tracked to ensure you are moving in the right direction.

There is a clear opportunity to go beyond satisfaction and drive deeper engagement among clients.



In 2026 the Engagement Index hit a high after declining in 2021 and 2022. This key relationship metric declined following the pandemic, and in response to uncertainty, and then began to climb in 2023. This is a reminder that Engagement can be impacted by external events, making clients less likely to refer.



IMPACT*

Promoters are significantly more likely to be engaged.

Detractors	Passives	Promoters
0%	16%	47%
...are engaged		

Clients who perceive high value are 2x as likely to be engaged.

Low Value	Moderate Value	High Value
22%	34%	47%
...are engaged		

Clients who have higher self-confidence are more likely to be engaged.

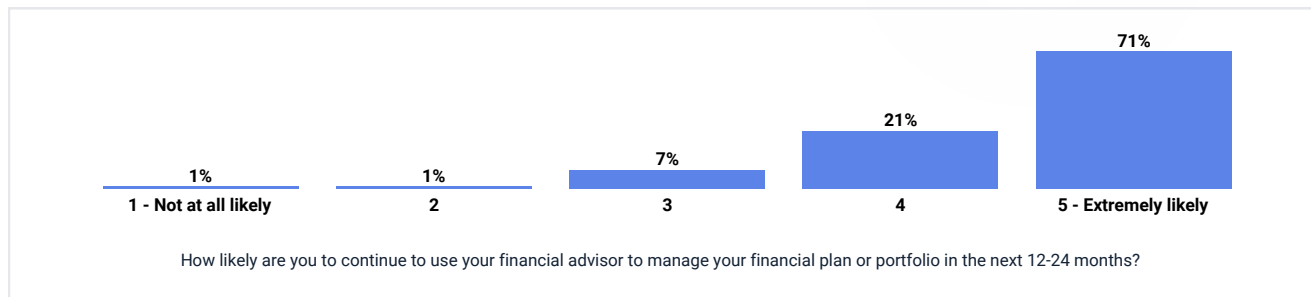
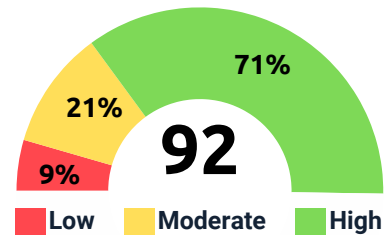
Low Confidence	Moderate Confidence	High Confidence
32%	29%	47%
...are engaged		

Loyalty Index

The **Loyalty Index** reflects the likelihood of a client continuing to work their advisor. The vast majority of clients are somewhat likely (21%) or extremely likely (71%) to continue working with their advisor.

The reason that attrition rates are considerably lower than the percentage of clients who indicate they may leave is simply inertia. It is easy to be overly confident, assuming that the current attrition rate is the true reflection of risk. The risk will be higher as new entrants come into the market that make it easier to move and demonstrate an understanding of client needs. The data suggests that clients will stick with an advisor in hopes of increasing their level of confidence, a tenuous form of loyalty.

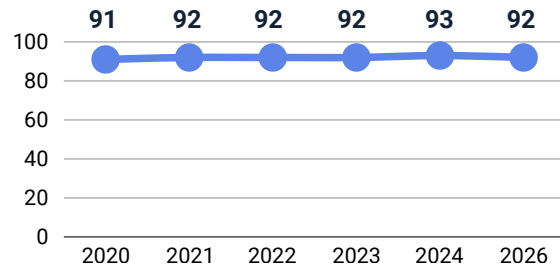
While most clients will stay, there are underlying risks masked by inertia.



*Note that the impact on satisfaction and referrals is not shown as both are included in the definition of engagement.



Loyalty is very steady across the industry which is both a positive sign and a reflection of inertia.



IMPACT

Satisfied clients are significantly more likely to be loyal.

Low satisfaction	Moderate satisfaction	High satisfaction
11%	37%	87%

...are extremely likely to continue working with their advisor

Promoters are significantly more likely to be loyal, noting a quarter of detractors are also loyal.

Detractors	Passives	Promoters
26%	49%	86%

...are extremely likely to continue working with their advisor

Clients who perceive high value are more likely to be loyal, noting that loyalty can still be high when perceived value is lower.

Low value	Moderate value	High value
51%	66%	90%

...are extremely likely to continue working with their advisor

While Self-Confidence is connected to satisfaction, NPS and referrals, it is less connected to loyalty.

Low confidence	Moderate confidence	High confidence
76%	67%	65%

...are extremely likely to continue working with their advisor

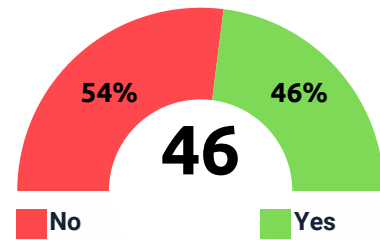
Referral Activation Index

The Referral Activation Index is a reflection of how successfully firms are leveraging strong relationships to drive growth. At Absolute Engagement we believe that focusing on actual referrals rather than likelihood to refer supports action.

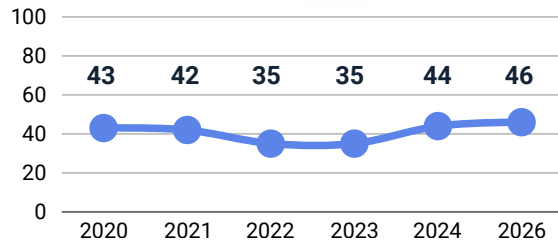
Most advisors are surprised to learn that nearly half of their clients say they have provided a referral. The data highlights a clear and persistent referral gap between the percentage of clients who are satisfied, those who are willing to refer and those who do. Advisors typically report receiving referrals from between 4-5% of their clients.

The referral gap exists because most referrals don't become introductions.

There is a persistent gap between client satisfaction and actual referral behavior.



Referral activity is on the rise after declining in 2022 and 2023. As noted in a following section, the global pandemic had an impact on referral activity that we see reflected here. It's important to note that while referrals have bounced back and exceeded pre-pandemic levels this is also being influenced by demographics. Younger clients are more likely to refer and those younger clients are pulling that behavior forward as they age.



IMPACT

Clients who are satisfied are more likely to refer.

Low satisfaction	Moderate satisfaction	High satisfaction
19%	41%	49%
...have referred		

Promoters are more likely to provide referrals.

Detractors	Passives	Promoters
11%	34%	55%
...have referred		

When clients perceive high value, relative to the fees they pay, they are more likely to refer.

Low value	Moderate value	High value
36%	49%	52%
...have referred		

Clients who are self-confident are considerably more likely to refer.

Low confidence	Moderate confidence	High confidence
38%	41%	66%
...have referred		



Referrals Don't Stand Alone Anymore

Why digital presence is now part of every advisor's referral system.

By **Meg Carpenter**, CEO and Co-Founder, Ficomm Partners

The Absolute Engagement data shows a referral gap that has frustrated advisors for years: clients are willing to refer, but most willingness never turns into action. Our research at Ficomm Partners, conducted in partnership with Absolute Engagement, points to a related truth that reshapes how firms should think about closing that gap. Referrals and digital presence are not competing strategies. They are multipliers.

When investors discover an advisor through more than one channel, they are dramatically more likely to refer that advisor to someone else.

We surveyed 1,000 high-net-worth investors in early 2026 and asked how they found their current advisor. The pattern was striking. Among investors who used four or more touchpoints to find their advisor, 85% have provided a referral in the last 12 months. Among those who used only one method, that number drops to 29%. The math is hard to argue with. Multi-channel discovery does not just bring in better-informed prospects, it produces better-referring clients on the other side.

The pattern holds, and intensifies, at the top of the wealth spectrum. Among investors with \$5 million or more in investable assets, half found their advisor with no referral involved at all. The wealthiest investors are doing more independent research, using more channels, and behaving more like investors under 45 than like the stereotype most firms still market to.

For firms that have built their growth model around referrals, this is good news. It means the work you are already doing to deepen client relationships is still valuable. It also means that a strong, strategic digital presence is no longer optional or additive. It is the validation layer that turns a referral into an introduction and an introduction into a client. And it is the engine that turns those clients into the next round of referrals.

Read the full research. Ficomm Partners' new research paper, The New Growth Equation, explores how 1,000 high-net-worth investors actually find, evaluate, and choose their advisors today. Available for download at ficommpartners.com.

Why great service doesn't lead to more referrals

For many years advisors have been told that they only need to deliver great service and referrals will follow. Just like the 'field of dreams' it is accepted wisdom that if you build it (a great experience) they will come.

The reality is that satisfaction is a necessary, but not a sufficient, condition of referrals. Put another way, willingness does not equal intent. Most satisfied clients do not refer; the same is true for "Promoters" (using the Net Promoter Score).

- 96% of clients are somewhat or very satisfied and yet half (46%) say they have provided a referral.

While there is a natural level of referrals that happen simply because advisors deliver a great experience, tapping into the bigger opportunity demands that advisory firms create a consistent process to facilitate more referrals. And while many industry observers have suggested the reason for the referral gap is behavioral - advisors don't ask for referrals - Absolute Engagement's research clearly proves that asking for referrals is not the primary driver of generating referrals.

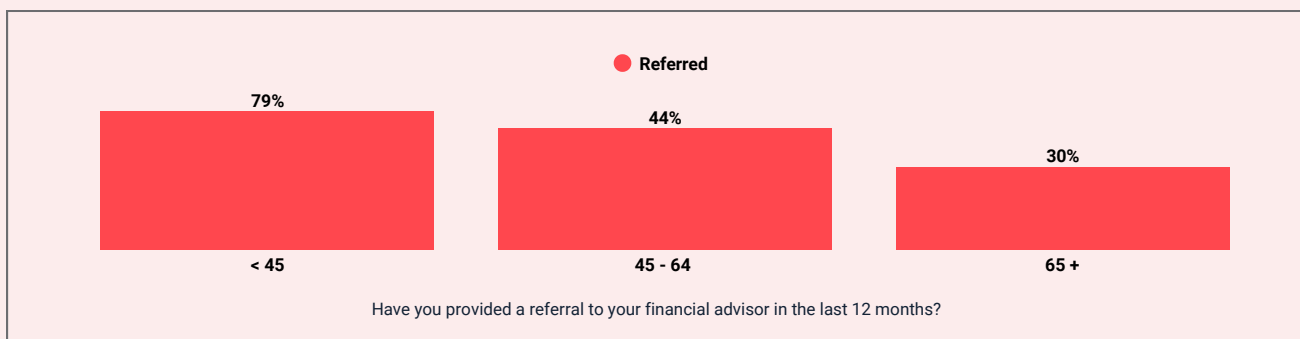
How demographics impact referrals

As advisory firms consider how they can support referral growth, it's important to examine the impact of age. We know that younger clients refer more frequently and should, therefore, be the primary target of referral efforts.

It is interesting to note that this is a behavioral characteristic rather than a consequence of being more satisfied with the relationship. Younger clients have a lower Net Promoter Score and lower average satisfaction ratings, but are more likely to refer. This suggests that younger clients are simply more likely to connect with others around the services they use, provided a baseline level of satisfaction is met.

Fifty-nine percent of respondents who are under 45 say they are very likely to continue working with their advisor, jumping to 81% for those who are 65+. Sixty-seven percent of respondents under 45 say they are 'very satisfied,' jumping to 77% for those who are 65+.

Despite that, clients under 45 are more than 2x as likely to say they provided a referral.





TAKING ACTION

The **Client Intelligence Monitor** is designed to do more than provide industry benchmarks. We hope that it will help leadership teams identify gaps in the data they are capturing, the insights that data generates and missed opportunities that result from both.

The industry averages in this report are an important starting point. They provide perspective on where advisory firms are performing well, where risks may be emerging and how client expectations and emotions are evolving over time.

However, benchmarks alone do not create differentiation. True competitive advantage comes from understanding these same metrics at the client, advisor and household level and using them consistently to shape decisions, conversations and experiences.

As leaders, consider the following actions:

- **Assess your current data strategy**
 - Evaluate whether you are capturing the right data, going beyond demographics and financial data to capture emotional drivers.
- **Move beyond lagging indicators**
 - Satisfaction and retention matter, but they are lagging indicators of risk. Add leading indicators such as self-confidence and perceived value to create an early warning system.
- **Generate household-level intelligence**
 - Capture insights across couples and families, not just primary decision-makers. Differences within households often reveal important engagement risks and opportunities.
- **Build longitudinal visibility**
 - The future competitive advantage in wealth management will come from longitudinal client intelligence, data that compounds in value over time.
- **Activate your data**
 - Use the data you capture to:
 - Equip advisors with client-level insights before meetings and provide context for better advice
 - Identify clients with declining confidence or rising concerns
 - Trigger proactive outreach based on unspoken needs
 - Personalize communication and engagement strategies
 - Support referral conversations intentionally rather than passively
 - Measure the impact of changes to your client experience
- **Align AI strategy with data readiness**
 - AI can amplify insight, personalization and efficiency, but only if you have access to structured, meaningful data and insights. The quality of the client intelligence data layer will determine the effectiveness of the AI layer.

A Final Thought

The firms that will lead, in future, will not necessarily be those with the most technology. They will be the firms with the deepest understanding of their clients. But neither stands alone.

Engagement is created when clients feel seen, heard and understood. Growth is accelerated by engagement. Activating both requires the right data, the right insights and the right technology.

About Absolute Engagement

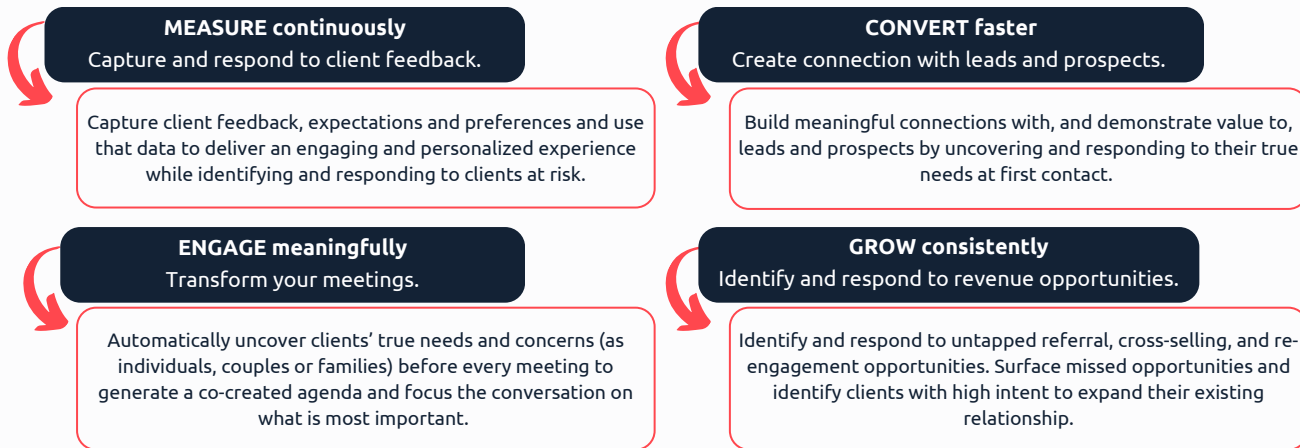
Absolute Engagement empowers advisory firms to accelerate growth and engagement using the Engagement Engine. Absolute Engagement was named one of the 100 most innovative wealthtech firms in 2024. Our award-winning technology captures and uses real-time data on the true needs of prospects and clients to uncover relationship risks and opportunities and support strategic decision-making.

The Engagement Engine includes a customizable Client Intelligence Tracker to allow you to capture Sentiments, Signals and Outcomes, providing rich insights for individual clients and couples and by advisor, office and the firm. Data is captured over time to create progressive longitudinal insights to support deeper conversations, engagement and growth.

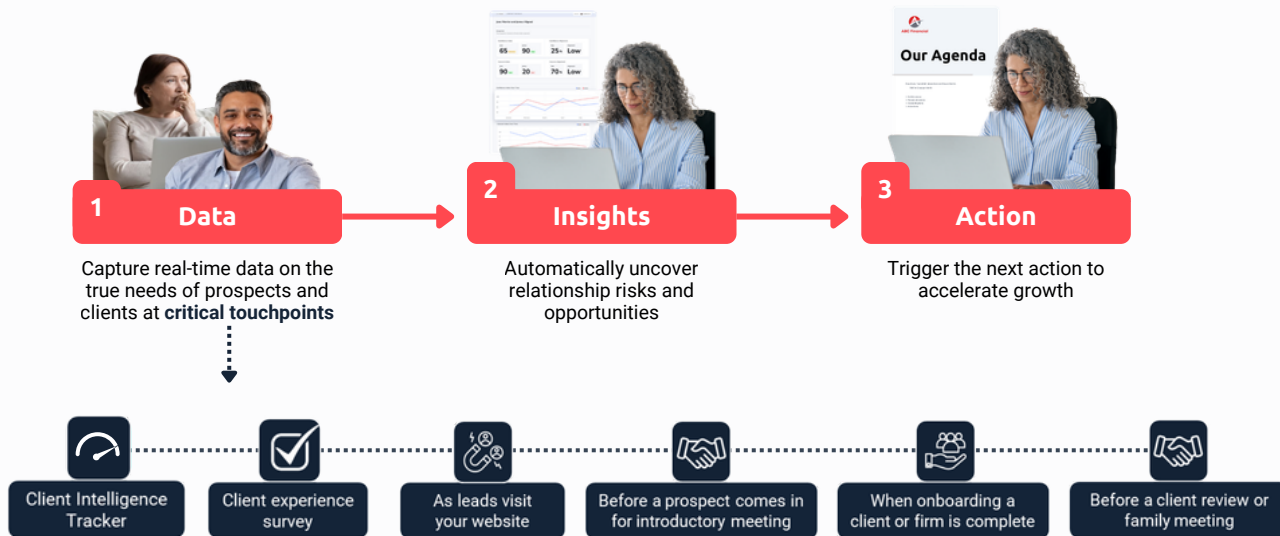
About the Engagement Engine

Award-winning engagement technology that captures and uses real-time data on the true needs of prospects and clients to accelerate growth and drive deeper engagement.

Use cases



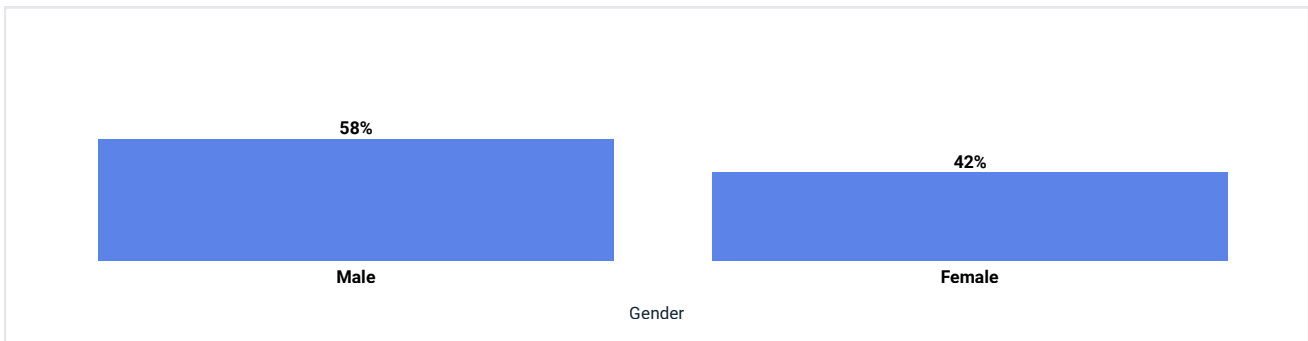
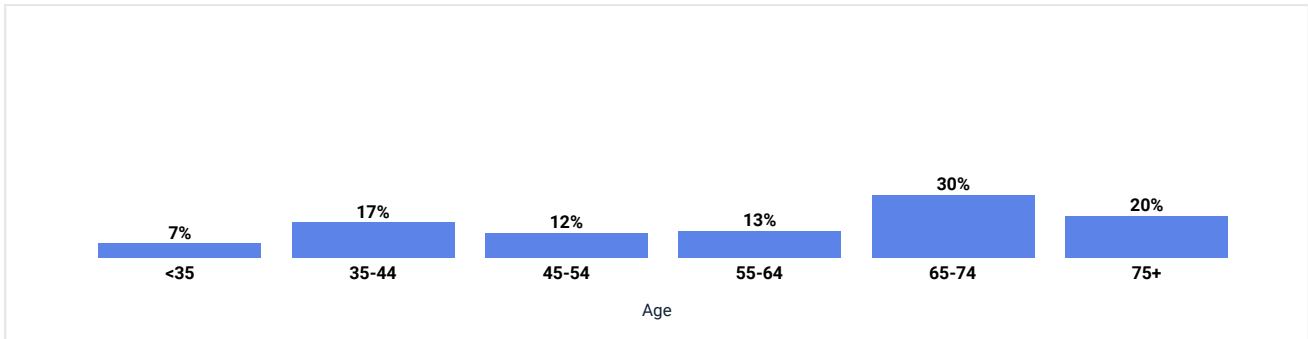
How it works



Appendix One: About the Research

Absolute Engagement conducts new investor research each year using high-net-worth investor panels. In 2026, the data was collected, via online survey, from 1,000 respondents between February 28 and March 9 with a 3.1% margin of error.

All respondents work with a financial advisor, meet specific household investable asset thresholds and have some involvement in financial decision-making. Fourteen percent of respondents have \$5m+ in household investable assets, 36% have between \$1m - \$4.9m and 50% between \$500k - \$999k.





Learn more about how you can use the Engagement Engine to easily capture, analyze and use client intelligence to accelerate growth and drive engagement.

Scan the code to book a meeting

