

RIA Industry Insights Study

The RIA Industry Insights Study is a research initiative aimed at exploring the complexities and dynamics of the Registered Investment Advisor (RIA) sector. This comprehensive study was conducted by Greenwald Research and involves a detailed survey of 201 RIAs across the United States, capturing a wide array of data on their operational practices, client management strategies, financial product utilization, and market outlook.

Importance of the RIA Industry Insights Study

Strategic Planning and Industry Benchmarking: The study serves as an essential tool for RIAs looking to gauge their performance against industry standards and identify areas for strategic enhancement. By providing an in-depth look at industry benchmarks, the study helps advisors understand where they stand in comparison to their peers and what practices lead to success.

Enhanced Client Relationships: Understanding the broader trends affecting RIAs allows advisors to better anticipate the needs and expectations of their clients. The study's insights into client demographics, behavior, and preferences are invaluable for RIAs aiming to tailor their services to better meet client demands and improve client engagement and satisfaction.

Adaptation to Industry Shifts: As financial markets evolve and new regulatory and technological changes come into play, RIAs must stay informed to remain competitive. The RIA Industry Insights Study offers critical information on how external factors are shaping the industry, enabling RIAs to adapt their practices and maintain resilience against market fluctuations.

Key Focus Areas of the Study

1. Business Operations and Growth Strategies:

This section assesses the strategies that high-performing RIAs use to scale their operations and increase their market share, including insights into effective marketing, client acquisition, and retention tactics.

2. Financial Products and Investment Strategies:

It explores the range of financial products and investment strategies employed by RIAs, offering a view into how advisors are diversifying portfolios and managing risk in the current economic environment.

3. Client Demographic Analysis:

The study provides a detailed analysis of the changing demographic landscape of RIA clients, helping advisors to forecast future trends and prepare for shifts in client needs and investment behavior.

The RIA Industry Insights Study is a resource for any financial professional seeking to refine their approach and thrive in an increasingly competitive landscape. By utilizing the detailed insights and strategic recommendations provided by the study, RIAs can enhance their service offerings, optimize their operational efficiencies, and build stronger, more resilient

businesses that are well-equipped to meet the challenges of today's dynamic financial environment.

[Download the Key Findings](#)



2024 RIA Industry Insights

IMPORTANT FINDINGS AND KEY FACTS



FINANCIAL PROFESSIONAL USE ONLY — NOT FOR USE WITH CONSUMERS

Annuities are issued by **Security Benefit Life Insurance Company** (SBL) in all states except New York. SBL is not licensed in and does not transact business in New York.

SB-10047-71 | 2025-06-23