



For your budget planning needs, this document contains topics and titles of Cerulli publications to be released in 2008.

See reverse for a list of research by practice area.

For a complete list of available research, including samples, please visit our website at www.cerulli.com.

To discuss our research and discounts that may be available to your firm, contact:

Marketing and Business Development

CMarketing@cerulli.com
+1 617-437-0084

CERULLI ASSOCIATES
ONE EXETER PLAZA
BOSTON, MA 02116
(T) +1 617-437-0084

28 MAXWELL ROAD,
#02-04
SINGAPORE 069120
(T) +65 6327 4045

WWW.CERULLI.COM

THE CERULLI THEMATIC REPORT SERIES

U.S. TITLES	RELEASE	PRICE (US\$)
1. Product Development in an Evolving Portfolio Construction Environment	2Q	\$12,000
2. Trends and Opportunities in Subadvisory	2Q	\$12,000
3. Financial Planning: Trends in Advice Delivery	3Q	\$12,000
4. Rollover and Retention: Strategies and Positioning	3Q	\$12,000
5. Portfolio Management: Recruiting, Retention, and Organizational Strategies	3Q	\$12,000
6. Managed Accounts: Economics of Asset Managers, Platforms, and Advisors	3Q	\$12,000
7. Pension and Investment Consulting: Insight for Asset Managers and Providers	3Q	\$12,000
8. State of the Independent and Insurance Broker/Dealer Channels	3Q	\$12,000
9. Retirement Income and Wealth Transfer: Implementing Insurance-Based Strategies	4Q	\$12,000
10. Alternatives and Structured Products: Positioning for the Retail Marketplace	4Q	\$12,000

INTERNATIONAL TITLES

11. Asset Management in the Middle East	1Q	\$12,000
12. Opportunities in Asia's Unit-Linked Investment Marketplace	3Q	\$12,000
13. Shariah Investing: Market Sizing & Analysis	4Q	\$12,000

THE CERULLI QUANTITATIVE UPDATE SERIES

U.S. TITLES	RELEASE	PRICE (US\$)
14. Cerulli Quantitative Update: Annuities and Insurance 2008	2Q	\$14,000
15. Cerulli Quantitative Update: Retail Product Marketing and Sales Organizations 2008	2Q	\$14,000
16. Cerulli Quantitative Update: Intermediary Markets 2008	2Q	\$14,000
17. Cerulli Quantitative Update: High-Net-Worth Markets 2008	2Q	\$14,000
18. Cerulli Quantitative Update: Retail Products and Strategies 2008	3Q	\$14,000
19. Cerulli Quantitative Update: Asset Manager Addressable Marketplaces 2008	4Q	\$14,000
20. Cerulli Quantitative Update: Managed Accounts 2008	4Q	\$14,000
21. Cerulli Quantitative Update: Retirement Markets 2008	4Q	\$14,000
22. Cerulli Quantitative Update: Advisor Metrics 2008	4Q	\$14,000

INTERNATIONAL TITLES

23. Cerulli Quantitative Update: Global Markets 2008 (formerly Global Update)	2Q	\$20,000
24. Cerulli Quantitative Update: Southeast Asia 2008	2Q	\$14,000
25. Cerulli Quantitative Update: Asset Management Opportunities in India 2008	2Q	\$14,000
26. Cerulli Quantitative Update: Latin American Distribution Dynamics 2008	3Q	\$14,000
27. Cerulli Quantitative Update: Asian Distribution Dynamics 2008	4Q	\$14,000
28. Cerulli Quantitative Update: Global Multimanager Products 2008	4Q	\$14,000
29. Cerulli Quantitative Update: Japan 2008	4Q	\$14,000
30. Cerulli Quantitative Update: Asset Management Opportunities in China 2008	4Q	\$14,000

THE CERULLI EDGE SERIES

	RELEASE	PRICE (US\$)
1. The Cerulli Edge—U.S. Asset Management Edition	Monthly	\$13,000
2. The Cerulli Edge—Global Edition	Monthly	\$15,000
3. The Cerulli Edge—Managed Accounts Edition	Quarterly	\$6,000
4. The Cerulli Edge—Advisor Edition	Quarterly	\$6,000
5. The Cerulli Edge—Asia-Pacific Edition	Quarterly	\$6,000
6. The Cerulli Edge—Retirement Edition	Quarterly	\$6,000

Edge prices may vary by firm size



ASSET MANAGEMENT

Product Development in an Evolving Portfolio Construction Environment
Portfolio Management: Recruiting, Retention, and Organizational Strategies
Trends and Opportunities in Subadvisory
Alternatives and Structured Products: Positioning for the Retail Marketplace
Cerulli Quantitative Update: Retail Product Marketing and Sales Organizations 2008
Cerulli Quantitative Update: Retail Products and Strategies 2008
Cerulli Quantitative Update: Asset Manager Addressable Marketplaces 2008
Cerulli Quantitative Update: High-Net-Worth Markets 2008
The Cerulli Edge—U.S. Asset Management Edition (monthly)

INSURANCE & ANNUITIES

Retirement Income and Wealth Transfer: Implementing Insurance-Based Strategies
Cerulli Quantitative Update: Annuities and Insurance 2008

INTERMEDIARY

Financial Planning: Trends in Advice Delivery
State of the Independent and Insurance Broker/Dealer Channels
Cerulli Quantitative Update: Intermediary Markets 2008
Cerulli Quantitative Update: Advisor Metrics 2008
The Cerulli Edge—Advisor Edition (quarterly)

MANAGED ACCOUNTS

Managed Accounts: Economics of Asset Managers, Platforms, and Advisors
Cerulli Quantitative Update: Managed Accounts 2008
The Cerulli Edge—Managed Accounts Edition (quarterly)

RETIREMENT

Rollover and Retention: Strategies and Positioning
Pension and Investment Consulting: Insight for Asset Managers and Providers
Cerulli Quantitative Update: Retirement Markets 2008
The Cerulli Edge—Retirement Edition (quarterly)

INTERNATIONAL

Asset Management in the Middle East
Opportunities in Asia's Unit-Linked Investment Marketplace
Shariah Investing: Market Sizing & Analysis
Cerulli Quantitative Update: Global Markets 2008
Cerulli Quantitative Update: Southeast Asia 2008
Cerulli Quantitative Update: Asset Management Opportunities in India 2008
Cerulli Quantitative Update: Latin American Distribution Dynamics 2008
Cerulli Quantitative Update: Asian Distribution Dynamics 2008
Cerulli Quantitative Update: Global Multimanager Products 2008
Cerulli Quantitative Update: Japan 2008
Cerulli Quantitative Update: Asset Management Opportunities in China 2008
The Cerulli Edge—Global Edition (monthly)
The Cerulli Edge—Asia-Pacific Edition (quarterly)