

2022–23 MacroMonitor Subscription Form

We agree to become a sponsor of the 2022–23 MacroMonitor. We understand that the price is for a two-year subscription, half billable immediately and half billable in January 2022. The products and services in this subscription are for the sole and confidential use of sponsors and may not be disclosed to others without CFD's prior approval. Subscription provides a license for one corporate site.

2022–23 MacroMonitor (4,000 respondents, including 2,000 affluent households)
Includes all Standard MacroMonitor and CFD deliverables

\$70,000/year (\$140,000 total) \$ _____

Optional deliverables are available for purchase at any time. If you would like to reserve some optional deliverables now, please indicate which ones below:

Syntax CD (SPSS or SAS dataset) \$3,000 \$ _____

Cadmium Premium: \$5,000/1 year; \$10,000/2 years \$ _____

Additional Consulting Hours: (Indicate # hours, days, weeks)
@ \$360 per hour, \$2,500/day, \$10,000/week \$ _____

Data Append: \$3,000/each \$ _____

Total \$ _____

Signature _____ Date _____

Name _____

Title _____

Company _____

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City/State _____ Zip _____

Telephone _____ Fax _____

Email _____

Please scan and email to smcgregor-noel@sbi-i.com.

The Subscriber agrees that it will not use the name of Strategic Business Insights (SBI), Consumer Financial Decisions (CFD), or MacroMonitor either expressed or implied in any of its advertising or sales promotional material. Because the project is of an advisory nature, neither SBI nor its employees assume any liability for special or consequential damages arising from the Subscriber's use of the project results. In no event shall SBI's liability to the Subscriber exceed the dollar amount of this agreement. The Subscriber agrees to indemnify, defend, and hold SBI, its officers, and its employees harmless from any liability to any third party resulting directly or indirectly from the Subscriber's use of any project report or other deliverable produced by SBI pursuant to this agreement.

MacroMonitor Deliverables

MacroMonitor deliverables are divided into three categories: Standard, Custom and Optional. Most standard deliverables are available from your subscriber landing page

Standard Deliverables

- *Website*. Subscriber password-protected landing page with access to MacroMonitor standard deliverables (1998–2022).
- *Data*. Complete data set in ASCII format (no respondent ID included). Data with syntax is available in SAS or SPSS for an additional charge.
- *Toplines*. 2022–23 MacroMonitor questionnaire with data trended against 2020–21 data. Topline Reports are available for both standard and affluent samples. Available in PDF downloads from your client landing page (hard copy available upon request).
- *Crosstabulations*. 2022–23 MacroMonitor data and calculated variables, crossed by: US Households, Age Cohorts, Socioeconomic Strata, and Life Stages. 2022–23 MacroMonitor Affluent data crossed by: Affluent Households, Affluent Segments, Core Customer Segments, and Millionaires. Available as PDF downloads and in Excel spreadsheets (hard copy and Excel files upon request).
- *Standard Graphic Analysis (SGA)*. PowerPoint slides charting results for the majority of 2022–23 MacroMonitor data. Decks available for: Generational Cohorts, Life Stage, Traditional Affluent, Affluent Core Customers, Millionaires, and Diversity Groups.
- *Trends Newsletter*. Trended, timely topics in a brief think piece delivered to your inbox each month. Newsletters from 2007 to present are available in The Vault.
- *Stories*. Context for the monthly Newsletter brings the population to life. Two *Stories* per are based on quantitative and qualitative MacroMonitor data with implications for financial institutions.
- *Cadmium Basic*. Password-protected, web-based application enables subscribers to access MacroMonitor data directly to produce custom tables easily. Basic includes a subset of MacroMonitor demographics, financial-product ownership behaviors, and attitudes, prebuilt variables such as balance-sheet data, age cohorts and Life-Stage segments.
- *The Vault*. Historic documents and reference materials such as: Marketing reports, Products and Services Analysis Volumes, Executive Reports, Quick Stats, and Long-Term Financial-Industry Trends.
- *Access to*. CFD experts and 20 hours of consulting included with subscription.
- *Responsive Customer Service*. Contact CFD at any time with questions, to review findings, or to request custom analysis: 24-hour response time is typical.

For answers to questions, or for more information, please contact:

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