Serving Retirement Income Clients

ENHANCE YOUR RETIREMENT INCOME PROCESSES AND CLIENT SUPPORT

Retirement Income isn't coming...It's here!

The baby boomer wave is here with over 70% of advisors reporting an increase in the number of retirement income clients they serve during the past year. The vast majority of advisors anticipate demand for support will continue to grow.

Despite serving an increasing number of retirement income clients, financial advisors are challenged with how to effectively attract and engage investors regarding retirement income and related topics.

"**Serving Retirement Income Clients**" is a guidebook designed to provide advisors with prescriptive insights on how to best serve and support clients nearing and in retirement. The guide addresses the opportunity and demand related to retirement income support, how to work with retirement income clients, expanding services and non-traditional support to meet the needs of retirees, and the key steps in developing an effective retirement income process.

A Best Practices Guide for Advisors

BASED ON IN-DEPTH INTERVIEWS AND SURVEYS WITH THOUSANDS OF ADVISORS

IDENTIFIES ADVISOR BEST PRACTICES IN DELIVERING RETIREMENT INCOME

DEVELOP AND ENHANCE YOUR RETIREMENT INCOME PROCESS WITH PRACTICAL AND ACTIONABLE ADVICE

CUSTOMIZED PROGRAMS AVAILABLE

TOPICS ADDRESSED

- Creating a vision of retirement for the client
- The discovery process and developing a deeper picture of the client situation
- Creating and presenting a retirement income plan
- Evaluating and expanding services to support retirement income clients
- Managing income portfolios and the various approaches to consider
- Addressing the expanded risks clients face in retirement
- Monitoring and adjusting retirement income plans and portfolios
- How to discuss, engage, and communicate retirement income related

GUIDEBOOK FEE

$35.95 INCLUDES:

- A 60+ page prescriptive Guide with relevant worksheets to assist advisors in taking action
- Delivered electronically in a PDF format

SERVING RETIREMENT INCOME CLIENTS – CFP CONTINUING EDUCATION SELF STUDY PROGRAM

- CFP CE Credit Program Fee: $45.95
- Please contact us for more information regarding this program

FOR MORE INFORMATION, CONTACT

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