YOUR "YELLOW BRICK ROAD"

TO GROWING A SUCCESSFUL PRACTICE WITH PROTECTION STRATEGIES

"Join me and my friends at the Alliance for Lifetime Income. Together, we can help make financial freedom in retirement a reality for more Americans. Starting now. Starting with you."

–Elton John

Are your clients living or approaching their next chapter with excitement and newfound energy? Checking off their bucket lists? Embracing adventures like an epic trip around the world? Or doing simple things like spending more time with their families?

Whatever their passion, it all starts with having a retirement plan that includes protected income, an essential foundation to avoid outliving their money and living the life they want.

And that begins with "checking off the basics," to ensure they have enough protected income to cover their essential expenses in retirement. With the basics covered, they'll have the freedom follow their own Yellow Brick Road.

THE NEW RETIREMENT INCOME GUIDE | Alliance for Lifetime Income

JACKIE

CAUTIOUS PREPARERS

Financial Status: Mass Affluent
Age: 70
Marital Status: Widow with two children and four grandchildren
Assets: $2 Million

- Diversified portfolio of equities, bonds and cash
- Includes proceeds from husband's $1 Million life insurance policy

FINANCIAL PLANNING PERSONALITY OVERVIEW

- Have an uncertain outlook on their future and not yet optimistic about retirement
- Have a good savings ethic and modest expectations
- Decision-making is guarded and quite risk averse
- Will seek professional guidance
- Would benefit from a clearer path to their goal and should be reassured their retirement dreams can be realized

CLIENT OPPORTUNITIES

MARY & ED

AMBITIOUS RISK TAKERS

Financial Status: High Net Worth
Age: Mary (64); Ed (65)
Marital Status: Married with one daughter, now age 30
Assets: $5 Million

- Diversified portfolio of equities, bonds and cash
- $500,000 Second-To-Die life insurance policy

FINANCIAL PLANNING PERSONALITY OVERVIEW

- Have a strong desire to succeed
- Optimistic, confident, and ambitious — fully activated on the path to their next chapter
- Feel safe, secure, and proud of what they have achieved thus far
- Excited about what they will experience in retirement
- Open to guidance and new ideas

CLIENT OPPORTUNITIES

SUE & BEN

PURPOSEFUL PLANNERS

Financial Status: Mass Affluent
Age: Sue (66); Ben (67)
Marital Status: Married with children and aged parents
Assets: $2 Million

- Diversified portfolio of equities, bonds and cash
- $500,000 life insurance coverage on each

FINANCIAL PLANNING PERSONALITY OVERVIEW

- Cautiously optimistic, confident, and attentive to finances
- Don't leave much to chance and tend to take moderate risk
- Proud of accomplishments
- Have high expectations relating to retirement
- Have a good understanding of personal finance and work well with financial professionals

CLIENT OPPORTUNITIES

RESOURCES

INVESTING PERSONALITY QUIZ

RETIREMENT INCOME SECURITY EVALUATION (RISE) SCORE™

ANNUITIES LANGUAGE GLOSSARY

RESOURCE LIBRARY