Retirement Income Planning and Product Solutions

Earn Client Trust and Demonstrate How Annuities, Long-term Care and Life Insurance Can Help Clients Better Prepare for Retirement

Tegra118

Retirement income planning represents a significant opportunity for financial advisors and insurance agents as many investors today don't feel confident with their current retirement strategy, or don't have a retirement plan in place at all. With Tegra118 technology, advisors can use innovative tools to communicate retirement solutions to clients and deliver more impactful advice.

Insurance plays a powerful role in everyday life. Yet many consumers today don't fully understand its value when it comes to their retirement plan. To address this, Tegra118 offers technology that provides a powerful way for financial advisors to demonstrate how annuities, long-term care and life insurance can improve a client's financial outlook.

Create a holistic financial picture for clients and build a plan of action that presents a dynamic analysis with the right combination of strategies and investments in context of a client's goals and objectives. With Tegra118, technology is flexible to each individual practice and client sessions are interactive.

Deliver Personalized Recommendations and Educated Advice

Tegra118 technology enables financial professionals to display a clear view of a client's financial standing – today and throughout retirement – by forecasting and analyzing their full financial picture, including assets, income, expenses, liabilities and insurance. Financial advisors and insurance agents now have the ability to gauge a more

robust and visual view of a client's income distribution from retirement portfolio, social security, annuities, and pensions throughout the client's lifetime and across multiple market assumptions.

Subsequently, advisors can offer educated advice to clients on how to mitigate retirement risks through specific product illustrations, such as annuities, life insurance and long-term care. Productivity enhancers, like the calculator function, estimate the amount each product will generate and demonstrate the overall benefit to the retirement plan.

Harness the Power of What-if Analysis and Better Collaborate With Clients

In real-time collaboration with clients, advisors and insurance agents can compare and contrast scenarios side-by-side in order to identify and illustrate the best solution. The system is capable of producing multiple scenarios, enabling advisors to illustrate any number of retirement assumptions and alternative strategies their clients may need. Parameters demonstrated in the graphic representations can be refined by layering income sources and expenses, painting a clearer picture of financial projections.

A Picture Speaks a Thousand Words

The output function on the system comprises a full package takeaway for clients, including a detailed summary and action plan. Clients will trust the intuitive analysis and true-to-life functions from the technology. Deliver advice the proper way by demonstrating the facts and painting a clear, holistic financial picture.

Flexible Data Input

The user interface is designed for quick, efficient and interactive planning sessions. Client information can easily be imported or manually entered. The detail of the data input can conform to the complexity (or simplicity) of the client's financial situation. With one click, household data, financial information and economic assumptions are easily imported and integrated.

Customizable Business Solutions With Ease, Speed and Scale

Retirement income planning and product solutions technology from Tegra118 is highly-scalable and flexible to accommodate your growing business needs. Our solution is also available through APIs so financial institutions can utilize all the functionality and calculations of our technology with complete control over the user experience.

Key Benefits

- Simulate multiple product-agnostic annuity, long-term care and life insurance scenarios, demonstrating the need for such products in the client's financial plan

- Create a new source of revenue for advisors, insurance agents and your financial institution

- Improve client collaboration with interactive data entry

- Construct multiple what-if scenarios to find the best solution for clients

- Leverage powerful data visualizations and easy-to-read charts and graphs that inspire client action

- Show side-by-side comparison of multiple cashflows

- Leverage Monte Carlo simulation for forward-looking investments growth.

Connect With Us

For more information about retirement income planning and product solutions, visit www.tegra118.com.

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