Build and Grow Relationships With Goals-Based Financial Planning

Consumers want help with their retirement planning. They aren't confident in the casual advice they receive and they worry about the future – especially when it comes to how much they're saving. They need a plan and advice they can trust.

The untapped opportunity for financial advisors

Information is needed

Less than half of consumers **feel informed** when it comes to saving for retirement.

The opportunity is there

72% of consumers do not currently have a **financial advisor**.

Many consumers want a plan

Of those saving for retirement, only **37% feel confident** they're saving enough.

Having a financial advisor – and a plan – increases confidence and satisfaction

81% of those with a financial advisor say they're **confident** in the advice they receive.

74% are **satisfied** with their financial advisors.

87% say they **follow** their plan closely.

76% of clients who are provided with a plan **purchase insurance** or investment products*.

*Source: "Retirement Confidence and Security: Experiences, Expectations, and Benefits of Planning," LIMRA Secure Retirement Institute, 2014

Tegra118 technology can help advisors deliver greater value to clients

A complete picture

Straightforward illustrations clarify clients' financial situations and show how annuities and insurance options offer protection.

A look at "what if"

Scenario management helps identify the best solution in real-time collaboration with clients.

Powerful visualization

Easy-to-read charts and graphs make client conversations and decision-making more productive.

Sophisticated analysis

Advanced calculations help estimate probability of success toward goals.

Financial & Retirement Planning solutions from Tegra118 can help advisors deepen client relationships, maximize efficiency and deliver the service today's consumers expect. From planning tools and scenario management to powerful visualization and sophisticated analyses, our solutions enable financial advisors to help clients prepare for retirement.

Connect With Us

For more information about Financial & Retirement Planning solutions, email info@tegra118.com or visit www.tegra118.com.

Unless otherwise noted, all data is drawn from the Fiserv quarterly consumer trends survey, Expectations & Experiences: Borrowing and Wealth Management (2018). More information is available upon request.

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