

## 5 Reasons People Seek Out a Financial Professional

Retired? Retiring soon? The **Income Outcomes: Retirement Planning Confidence Study** of retirees and pre-retirees shows that guidance on financial planning is needed. Here's how:



### Making Financial Decisions

People research financial information online. But men and women alike cite financial professionals as one of the **top resources** when making important financial decisions.



### Creating Retirement Resources

Increasing retirement savings and creating a financial plan are among the **top reasons** people want to work with a financial professional.



### Reviewing and Adjusting Plans

Inflation and cost of living rank highly among the reasons people adjust retirement income plans. **Financial professional recommendations** and periodic budget reviews also are often what encourages these adjustments.



### Choosing an Annuity Company

When choosing a company, a financial professional's recommendation is one of the **top three** factors. People trust them to know which products and companies will serve them best.



### Meeting Unmet Needs: Pre-Retirees are Looking for Help

More than **half** of people polled age 50-75 do not currently work with a financial professional. Yet **one in three** pre-retirees is looking for one.

**Clients look to professionals for retirement income planning guidance.  
Look to us for the retirement income planning tools to help.**

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