NewRetirement

For Financial Services

# Improve Client Knowledge and Sell More Services

## Elevate the client experience with advanced digital and mobile financial planning offerings to meet the expectations of digitally engaged clients

NewRetirement is an advanced financial planning and management platform, combining innovative technology, insights, education, and community designed for a person's entire life.

Equipped with knowledge, customers will seek your products, expertise, and support for the execution of key decisions.

> "95% believe that an asset manager's technology, data and digital capabilities will be differentiators"
>
> The Future of Asset Management by Accenture 2021

### Insurers

- Higher client engagement in retirement planning
- Automated recommendations based on personal needs
- Increase up-sell and cross-sell of products and services

### Wealth Management and RIAs

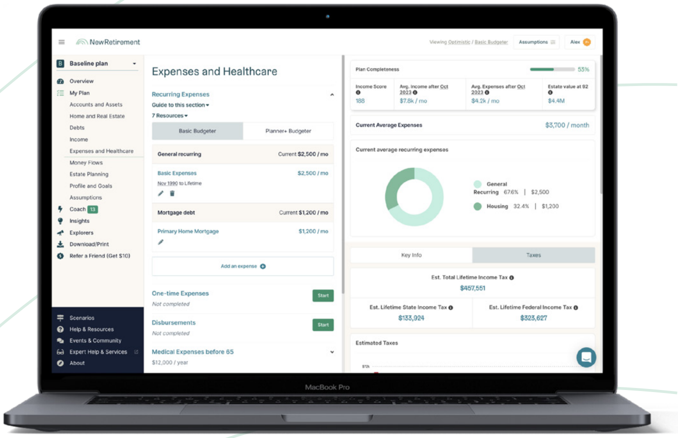
- Speed to market with digital planning (plan building, scenario modeling, and tracking)
- Coaching and insights (recorded courses, learning articles, podcast, videos, and community)
- Deliver more advisory services (CFP, tax, estate, investing)

### Banks

- Automate upsell of products and services
- Gain higher client satisfaction and increase client retention
- Faster to market with digital-first new business models
- Attract a new generation of clients

### Reverse Mortgage Providers

- Provide better knowledge of reverse mortgage options that can help clients
- Increase conversion rate by better illustrating the value of home equity
- Collect more data about prospects and how best to serve them

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