NewRetirement

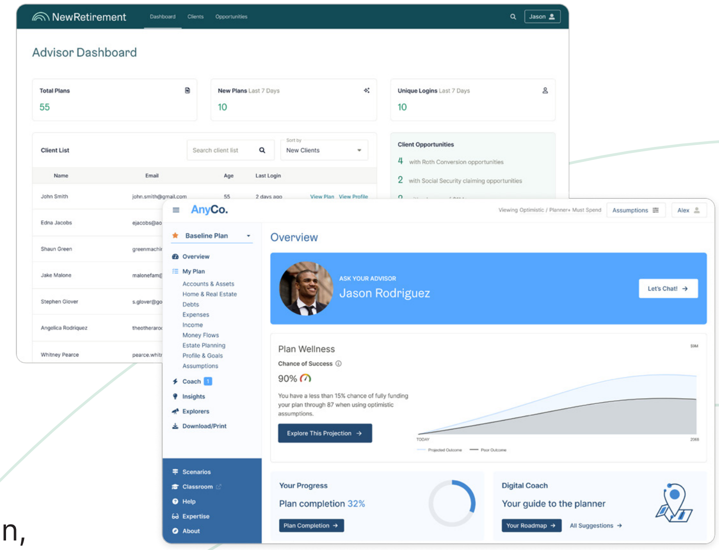
For Financial Advisors

Collaborate Efficiently with More Customers

Financial planning tools that educate your clients, efficiently scales your business and gets you to higher revenues faster

COLLABORATIVE FINANCIAL PLANNING

NewRetirement's Financial Advisor platform enables advisors to work together with their clients in a digital-first approach to financial planning. Advisors can better engage and retain clients while gaining more time to focus on client outcomes and drive their financial success before, during, and after retirement.



Client-led information collection with less effort

The collaborative process is easy to use for clients, only takes minutes, and lets you hit the ground running.

Build plans that build trust

Clients build an understanding of what's driving the plans you recommend, leading to smart questions, better decisions, and confident action.

Target opportunities for maximum impact

Advisors can quickly see opportunities for improvement to better serve each client.

Accumulation and Decumulation

Holistic planning, with both accumulation and decumulation, for lifetime income management.

You own the relationship

Clients can easily contact you or schedule appointments from within the platform when they want additional support.

Key Benefits

- White labeled version financial planning platform with your branding
- Enable clients to create a complete digital-first plan in less than 15 minutes
- Better engage and retain clients while enabling cost-efficient collaboration
- Have deeper strategic conversations with clients with more efficiency
- Help clients increase their financial literacy
- Access management portal where advisors can view all client plans

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