



MONEY MANAGEMENT INSTITUTE

ADVANCING THE FUTURE OF
INVESTMENT ADVICE AND SOLUTIONS



Next Chapter

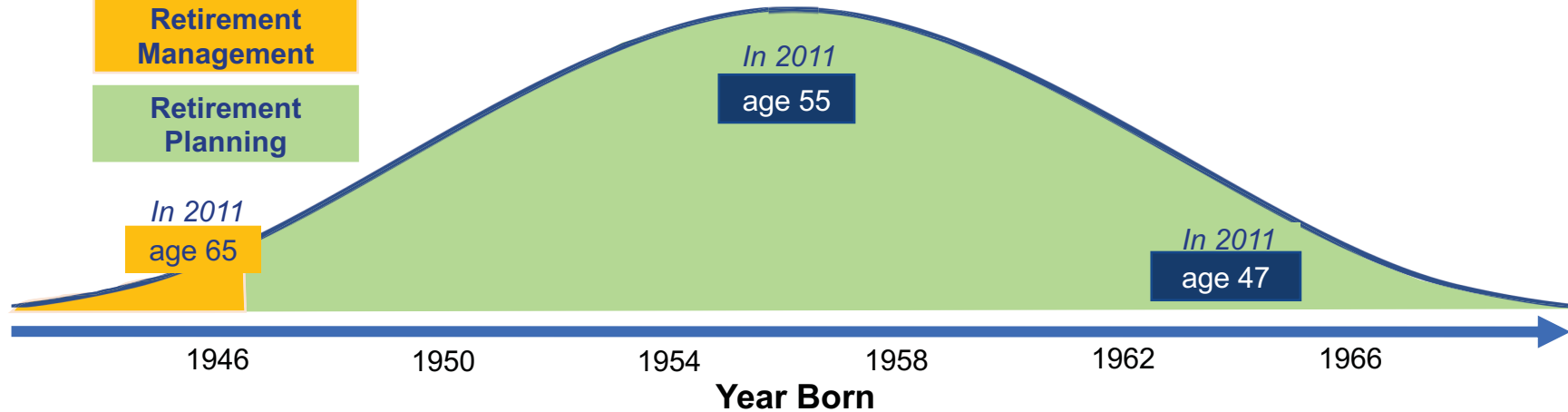
Taking on the opportunity of the Retirement Income Age

Steve Gresham and Gary Holland

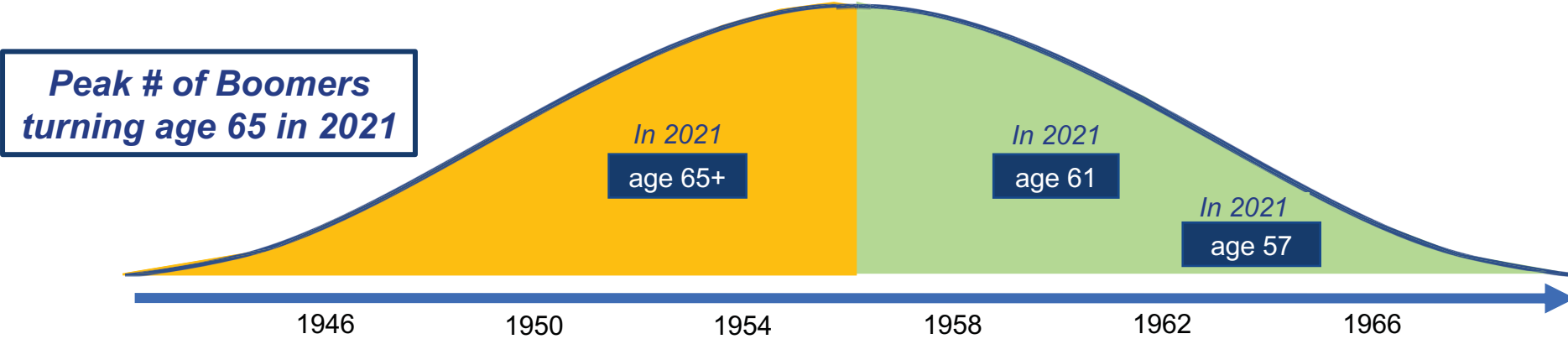


CONNECT KNOW GROW

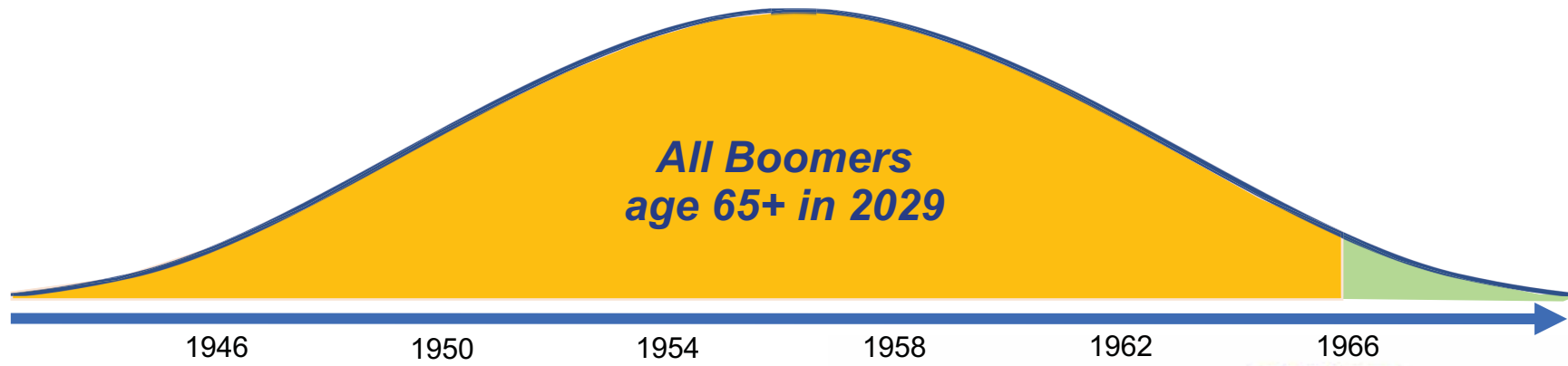
In 2011, 10 years ago, the first Boomer turned age 65; most Boomers have been focused on retirement planning



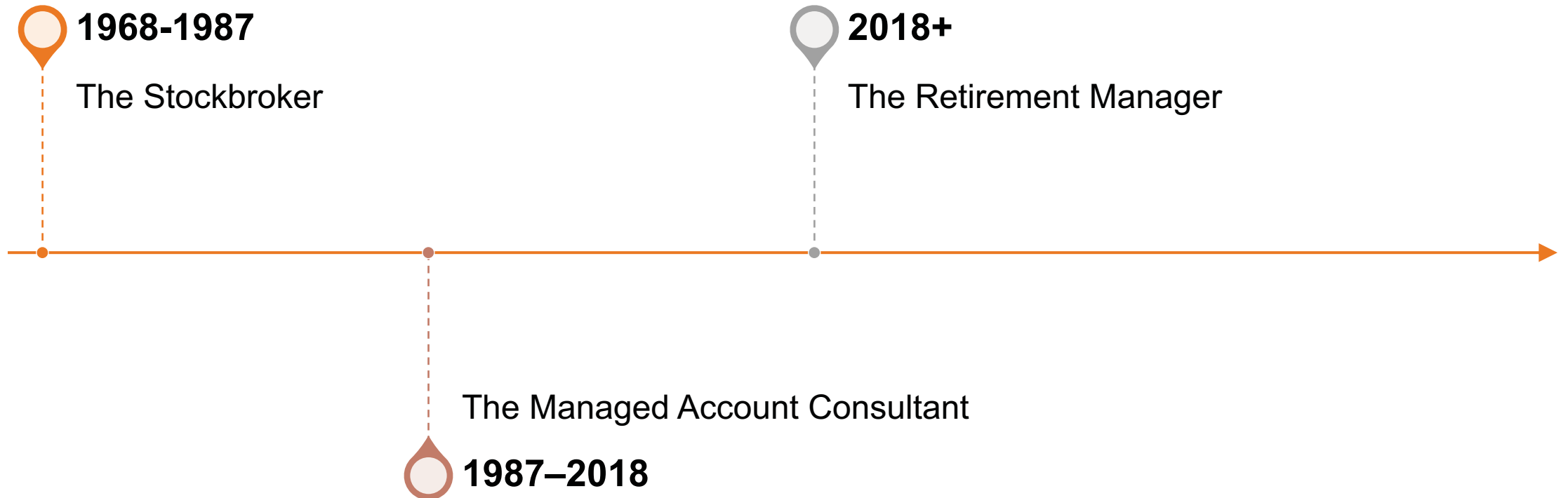
Now, 50% of Boomers are transitioning to retirement management

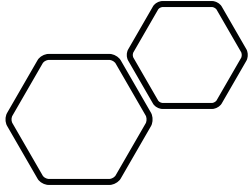


In the next 8 years all Boomers will transition to retirement management



Evolution of the Financial Advisor





Next Chapter: Building a new advice eco-system



FINANCIAL ADVISORS – TRANSITIONING TO AN EVEN MORE CONSULTATIVE ROLE, MANAGING MORE COMPLEX SOLUTIONS, INCORPORATING DIGITAL TOOLS



WEALTH MANAGEMENT FIRMS – SUPPORTING A BROADER ARRAY OF SOLUTIONS BUT ALSO MAKING “PLANNING” MORE APPROACHABLE



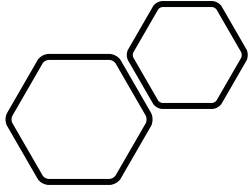
INVESTMENT MANAGERS – PROVIDERS OF DIFFERENT COMPONENTS OF ADDED VALUE, BETA, ALPHA AND LIABILITY MATCHING STRATEGIES



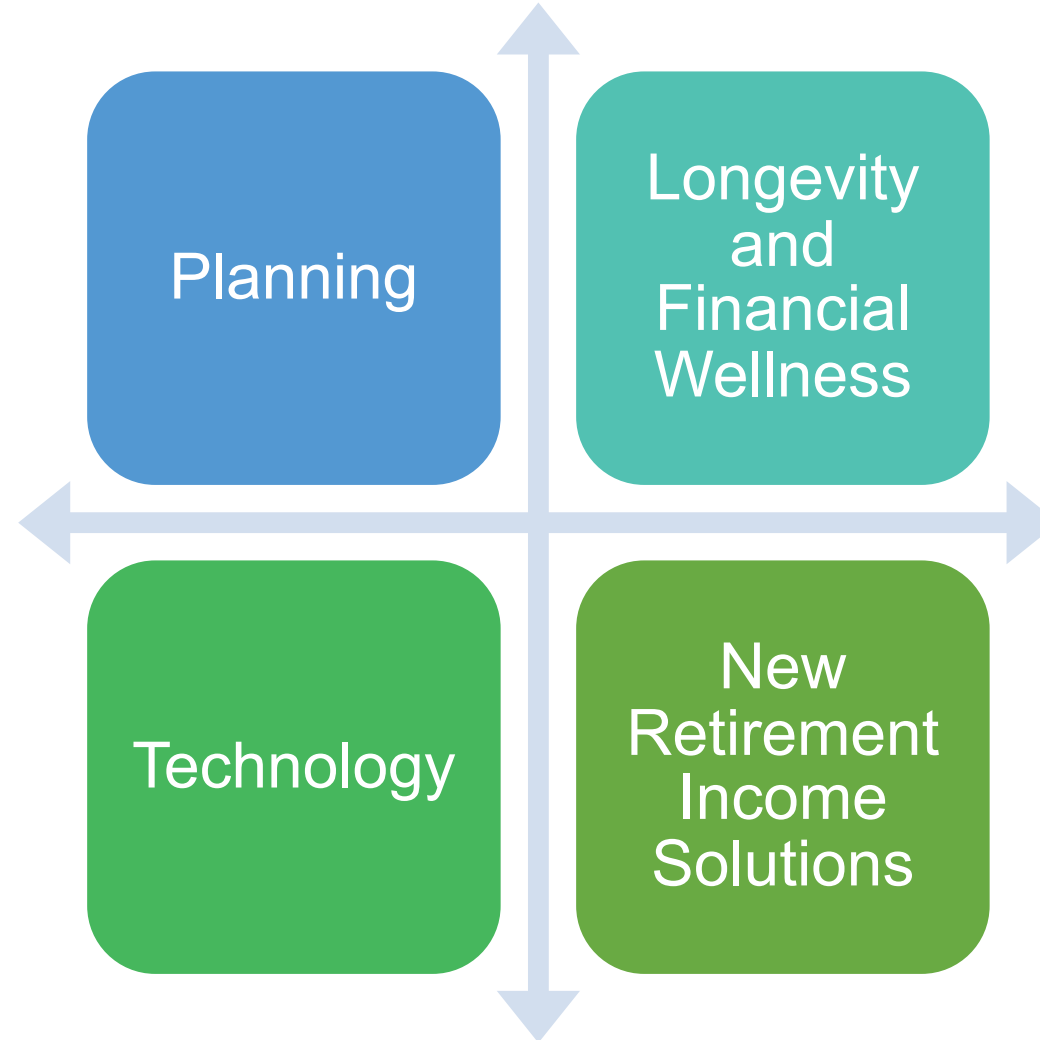
INCOME PRODUCT UNDERWRITERS – GUARANTEED SOLUTIONS, LEVERAGING CLIENT ASSETS TO OFFSET RISKS OF LONGEVITY, HEALTH CARE COSTS AND ESTATE VALUE



OPERATIONS AND TECHNOLOGY PROVIDERS – INDUSTRY INFRASTRUCTURE, RE-DEFINING EASE OF USE, WORKFLOW, CONSISTENCY AND SOLUTIONS FOR SCALE



The Next Chapter True North: The Retirement Client CX



Managing the Next Chapter: Populating the Eco-System

Better Planning	Longevity and Financial Wellness	Technology	Retirement Income Solutions
Application and Integration of Planning Tools	Longevity Planning	Communications	Family Financial Management
Adoption of Tools and Digital Resources	Financial Wellness	Centralized Service and Client Experience	Better Integration of Retirement Income Products
Emotional Intelligence	Risk Mitigation	Prioritizing Investments across Human and Digital Capabilities	The Home as an Asset
Financial Literacy	Healthcare Planning	Tele-Advice	Innovation



Questions?



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