

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 AI-based 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.

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 speed to market with digital financial planning

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



95% believe that an asset manager's technology, data and digital capabilities will be differentiators

The Future of Asset Management by Accenture 2021

