

# Product Reframed Executive Summary

It's time to think differently about retirement

In an era where retirement security is a growing concern, advisors and consultants have a large role to play in guiding their clients toward a secure financial future. Yet a significant opportunity lies untapped: guaranteed lifetime income (GLI).

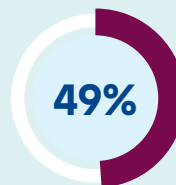
Harnessing the opportunity presented by modern, in-plan annuities requires more than just knowledge about how these products work. It is about equipping yourself with practical tools and tactics to seamlessly integrate GLI into your client conversations and workflows.

To help advisors and consultants position themselves as trusted specialists in this evolving space, Allianz Life Insurance Company of North America (Allianz) has put together a detailed white paper that dispels common misconceptions about in-plan annuities, and provides strategies for educating clients about the value that guaranteed lifetime income products, such as annuities, can bring to a plan.



**As interest in these solutions continues to grow, actively and earnestly discussing in-plan annuities with your clients can:**

- Improve client satisfaction
- Help differentiate your practice in a competitive marketplace
- Give you an opportunity to stay ahead of the learning curve
- Help position you as a leader and influencer
- Help you experience a powerful driver of personal and professional growth



**Nearly half (49%)** of private-sector plan sponsors that do not currently offer an in-plan annuity **have considered adding one.**



**3 in 4 claim they will make this decision within the next 12 months.** However, they rely on their advisors to guide them through the complexities and navigate the various options available.<sup>1</sup>

**The white paper aims to clear up historical misconceptions as well the other obstacles that have limited widespread adoption of GLI products, and to provide advisors and consultants with a launch pad for deeper and more meaningful discussions about the evolution of these products, and the valuable contributions they can make to a comprehensive financial plan.**

→ **CLICK HERE** to access the full white paper, or go to [allianzlife.com/dcplanresearch](https://allianzlife.com/dcplanresearch)

<sup>1</sup>In-Plan Annuities: The Plan Sponsor Perspective, LIMRA, 2023

# Tired of the same old retirement income talk?

## Discover tools to help you reframe the retirement income conversation

Our team is dedicated to providing fresh perspectives and practical tools to help you elevate your practice and navigate the ever-changing landscape of retirement income. Browse our library of white papers, blogs, and practice management resources today.



VISIT [www.allianzlife.com/dcplanresearch](http://www.allianzlife.com/dcplanresearch)

## Let's break the mold together

Contact the dedicated Employer Markets team at Allianz to learn more about our differentiated solutions and strategies.



EMAIL [retirement-income@allianzlife.com](mailto:retirement-income@allianzlife.com)



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