



Insured Retirement Institute

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IRI “Life Changes” Checklist Promotes Personal Financial Security

*Annual Review of Circumstances at Home and in the Workplace
Key to Financial Freedom, IRI Says*

WASHINGTON, D.C. – Reports show that each year about 100 million Americans make New Year’s resolutions, with securing financial freedom often among the top goals. Yet, about four out of five people do not keep them.

To further assist consumers in their New Year planning, the Insured Retirement Institute (IRI) today released its “[Life Changes Checklist](#),” a wide-ranging tool that can help identify personal circumstances that may have implications on financial planning.

“The beginning of a new year often marks a time for self reflection, revisiting personal and financial goals and setting a renewed course to help achieve these aspirations,” said Cathy Weatherford, President and CEO of IRI. “Taking a holistic look at family, career, personal finance and health changes is key toward achieving long-term financial freedom. Consumers can start the New Year off on strong financial footing by completing this checklist and consulting with their financial advisor. Now more than ever it is critical for consumers to increase their personal stake in their retirement planning.”

Earlier this year, IRI released “[Turning Financial Stress into Financial Freedom](#),” a tip sheet for consumers to help outline a path for a financially secure future. Additional retirement planning resources can be found online at www.IRIONline.org

About the Insured Retirement Institute: The Insured Retirement Institute (IRI) is a not-for-profit organization and is the authoritative source of all things pertaining to annuities, insured retirement strategies and retirement planning. IRI exists to vigorously promote consumer confidence in the value and viability of insured retirement strategies, bringing together the interests of the industry, financial advisors and consumers under one umbrella. IRI’s mission is to: encourage industry adherence to highest ethical principles; promote better understanding of the insured retirement value proposition; develop and promote best practice standards to improve value delivery; and to advocate before public policy makers on critical issues affecting insured



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