

IRI's Baseline Values: Transforming Retirement Planning



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Financial Planning with Annuities

Annuities have historically been challenging to model in financial planning platforms. Annuities provide unique benefits, such as lifetime income and protected growth. Including annuities in financial plans can improve client's planning outcomes including income stability, cash flow, and probability of success.

The Solution: Creating Easy Modeling with Annuities

IRI worked with CANNEX to create **baseline values** representing capital market assumptions to improve client outcomes and simplify the modeling process for financial professionals.¹

Now, financial professionals can easily incorporate these values into their planning models, enabling a more holistic financial plan.

Key Benefits:

- 1 Elevate the experience:** It's never been easier to model annuities using IRI's Baseline Values, simplifying the process and enabling greater scalability.
- 2 Showcase the value of an annuity:** Broaden the conversation by modeling and visualizing the impact annuities have on client outcomes.
- 3 Holistic planning:** Financial professionals can now easily include annuities in retirement plans for more comprehensive portfolio management.

Putting Baseline Values into Practice:

- 1 Get started:** Work internally to leverage the baseline values and incorporate them into your financial planning tools. These values are platform agnostic and adaptable to be leveraged in any tool.
- 2 Reach out:** Contact your internal sales desk or carrier wholesaler to discuss how baseline values can create the client-focused experience you seek.
- 3 Educational Resources:** IRI's [Retirement Income Handbook](#) provides insights into annuities' role in portfolio protection and growth.

With IRI's Baseline Values, it's never been easier to model annuities! Start using the IRI Baseline Values and make annuities a key part of your retirement planning strategy today.

¹ Supplemental documents are available from IRI's website: The IRI Baseline Values & IRI Baseline Values Reference Document
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