

CONSUMER RISE SCORE™ PROFILES

7.2019

The Retirement Income Security Evaluation (RISE) Score™ can help your clients see if there's a gap between what they'll have and the income they'll need in retirement. See what people said after calculating their own RISE Score™.



USERS FIND RISE SCORE™ “SIMPLE” AND “INTUITIVE”

With Americans living longer, healthier lives, a secure retirement sometimes seems like a moving target. What will the stock market do? Where will interest rates go? What will our expenses be? Our long-term financial security can be boiled down to one simple, yet elusive, question: How much income will be enough?

The Retirement Income Security Evaluation (RISE) Score™ helps you better determine how much money you'll need in retirement and what you'll have, providing a score – like a credit score – that helps you understand where you stand. Simply answer approximately 10 questions to learn how well your retirement income will cover your basic living expenses.

We asked some early users for their feedback. Here's what they had to say:

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I found this tool to be pretty intuitive and easy to follow. I knew exactly what they were asking for. I learned I'm going to need to pay more attention to what my expenses are going to be once I reach retirement...what I'm facing and how I plan for that. You tend to lowball your expenses because you're not really sure! I need to remain more conscientious as to where my money's going now and what that means for the future, and just continue to plan... to be proactive instead of waiting for it to happen.

Jim Powers

Age: 61, Palm Springs, CA

Planned Retirement: Approximately 2024

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I like the simplicity and fairly short amount of time required to go through the whole thing. What was really nice were the averages the tool provides, like for monthly expenses. I was below the average monthly expenses and realized I had forgotten groceries! The tool guided me in putting right numbers there. The results told me that I'm within reach of my retirement date.

Robert Patten Jr.

Age: 56, Rochester Hills, MI

Planned Retirement: Approximately 2025

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The steps were very clear and not threatening or confusing. The progress bar was awesome too. It moved every time I answered a question, so I knew I wasn't going to be in it for an hour. In five or 10 minutes, I was done – it was painless. The estimated averages helped me, especially on the expenses for the month. We're in really good shape. We both started planning in our 20s. We tell our kids that too.

Kari Maag

Age: 51, Cosby, MO

Planned Retirement: Approximately 2029

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The questions were really straightforward. I could understand everything they were asking. Overall, it was very user-friendly and intuitive. It said we were in good shape and that was reassuring.

Amy Randolph Leonard

Age: 57, Lynnwood, WA

Planned Retirement: Approximately 2024