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RETIREMENT EDITION

3Q 2012

Baby Boomer Issue

Article Summaries:

Pre-Retirees

Since investors often underestimate both the importance and urgency of retirement planning, providers need to continually educate younger investors through the accumulation years. This will allow providers the chance to build the case for retirement planning in the years preceding retirement, leading to more prepared investors when retirement does begin.

New and Recent Retirees

As older Boomers struggle to move from accumulation of assets for retirement to the process of income generation for retirement, providers have an opportunity to educate them and capture their in-retirement assets.

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