



News Release

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RISE® LAUNCHES FREE FINANCIAL EDUCATION TOOL AND VIDEO

ATLANTA, GA –AUGUST 5, 2010 – The Retirement Income Solutions Enterprise® (RISE®) is offering a free interactive financial education tool and video to financial advisors at www.theriseenterprise.com/salessolutions.

The emailable financial education PDF tool includes an introductory video and quiz designed to put consumers at ease, and allow them to identify specific areas where they can use the help of an advisor.

"The process of active engagement in the financial education process enables prospects and clients to experience for themselves the importance of managing financial and retirement risks--a critical step before moving toward more specific discussions and solutions," said R.H. "Rick" Carey, founder and principal of RISE.

The quiz does not provide investment advice or guidance and is product neutral, but it encourages consumers to contact the advisor to discuss the results, Carey said.

Research consistently confirms what many advisors instinctively know: the lack of basic consumer financial awareness is a national concern and a barrier to taking action.

Market research from Mintel Comperemedia in 2009 indicated Americans want more financial knowledge and opportunities to participate in financial education activities – but the wide variety of financial support services and interactive materials provided by the Internet is not enough. In early 2010, a Cogent Research “Investor Brandscape” study found low consumer confidence in financial institutions as well as dissatisfaction and low loyalty to financial advisors. The study’s findings suggested “considerable room” for image improvement. With the free RISE tool, advisors have a unique sales and marketing opportunity for promoting their individual brands.

Advisors who have incorporated a strategy of periodically conducting “financial education only” activities, separate from any product or service promotion, confirm an increase in both referrals and qualified prospecting leads. The financial education quiz and video prospecting and client retention tools are available at www.theriseenterprise.com/salessolutions

About RISE: The Retirement Income Solutions Enterprise® is dedicated to helping financial advisors and institutions profitably educate, recruit and satisfy clients with compelling retirement income solutions. Collectively, the RISE partners possess a wealth of experience that covers the full breadth of the retirement market. RISE brings a proven record of product and service achievement to the industry.

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