NORTH AMERICAN®
A Sammons Financial Company

Issued by North American Company for Life and Health Insurance®

EMPOWERED ENCORE
Connections that Matter

Embrace your future with confidence!

Working with a financial professional can be a pivotal step in **creating a secure retirement plan.** Recent research by North American and LIMRA highlights how financial professionals can make a substantial difference in helping consumers reach their retirement goals with confidence.

Stability and stress reduction

- Client satisfaction with their financial professionals is overwhelmingly positive, with 95% of consumers reporting a secure and favorable relationship.[1]
- Almost 88% of consumers[2] with a financial professional agree that lifetime-guaranteed income, such as annuities, plays a crucial role in **reducing the stress of outliving savings,** providing peace of mind.
- Clients with advisors consistently show higher optimism, with 69% of lower-income investors[2] feeling assured about sustaining their lifestyle, **versus 64% of those without advisor support.**

Preparedness and confidence

- A financial professional is pivotal in helping **create effective strategies** tailored to your retirement needs, with 76% of clients[2] highlighting their advisor's essential role in their planning journey.
- Engaging with a financial advisor has also been shown to increase investors' retirement preparedness. About 57% of higher-asset consumers with advisors **report feeling 'very prepared'** for retirement compared to 48% of those without.[2]
- Consumers cite numerous benefits of working with a financial professional, including improved financial health, smarter investment decisions, and developing a structured plan for the future.[1]

A financial professional can help you better understand your retirement options, create a plan that aligns with your goals and priorities, and guide you through the journey to your ideal retirement.

Look out for more insights from Empowered Encore, North American's latest research project, to help you navigate this important market and uncover additional opportunities to grow your business.

1. Sammons Financial® Group Empowered Encore 2024 Study
2. LIMRA (2024). Impact of Financial Professionals on Retirement Security: Third Edition. LL Global, Inc. www.limra.com/siteassets/research/research-abstracts/2024/2024-retirement-investors/impact-of-financial-professionals-on-retirement-security-third-edition.pdf