



PENSION STRATEGIES

QUALIFIED PLAN DESIGN & ADMINISTRATION

Strategic Update

Ideas, news and tips from Pension Strategies

September 2015

Financial Planners Increase Retirement Confidence

Financial planners play an important role in assisting plan sponsors with retirement plan choices, but a new survey shows planners also impact how participants view retirement.



The recent survey by Allianz and conducted by The

Futures Company surveyed 4,500 Americans of varying family types between the ages of 35 and 654 with household incomes of at least \$50,000. The survey reports 92% of respondents say their financial planner is helping them reach their retirement goals. Not only that, but 86% say their financial planner is relieving the pressure of planning for their family's future.

By comparison, 78% of those who have never worked with a financial planner are worried about saving enough for retirement and running out of money.

The education and insight provided by financial planners is making a huge impact on retirement confidence. Working with a professional helps clients understand the financial planning process and motivates them to save for the future.

Plan sponsors can help by facilitating connections between financial advisors and plan participants. There are often many resources available to help plan participants, but they may not always be aware of the options. Connecting participants to the right resources, is a great step toward retirement confidence.

**UPCOMING
DEADLINES**

Pension Strategies News

Pension Strategies staff loves to give back to the

September 15
Funding Deadline
for Calendar Year
Plans

October 15
Form 5500
Filing Deadline for
Calendar Year
Plans

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Strategies**

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community. This month we worked together to fill boxes for the hungry at St. Mary's Foodbank. Our team put together 1200 emergency food boxes!

Please let us know if you would like us to address any topics in upcoming issues of Strategic Update. We're here to be your best resource in the Retirement Planning industry.

Sincerely,
Jack Lawless, CPA, APM
Pam Johnson, QPA, CPC
Jill Hastings, JD
David Schattenberg, APA, Senior Consultant
Mallory Young, Senior Consultant

And the entire Pension Strategies team