
Breaking News

By Editorial Staff Thu, Jun 23, 2022

Income Lab launches 'Life Hub'; Ubiquity and Paycor announce 401(k) partnership; Amber Williams to lead Lincoln ESG initiatives.

Income Lab launches 'Life Hub'

Income Laboratory, Inc., a retirement income planning software provider, has introduced Life Hub, an interactive tool for that allows clients of financial advisers to “visualize their financial lives on one page, at any level of detail, and at any point in time.”

Life Hub is the only tool that seamlessly integrates dynamic retirement income plans and tax-smart distribution strategies. More than 200 advisors have been beta testing Life Hub for the past six months and the tool has just gone live, an Income Lab release said.

Financial advisers use Income Lab’s advanced technology to build and monitor dynamic retirement income plans that help retirees adjust for evolving economic and market conditions and make tax-smart distribution decisions. Income Lab’s software monitors retirement plans monthly to see whether circumstances have changed sufficiently to warrant modifications and then notifies advisers, who can discuss any adjustments with clients.

Life Hub is currently included as part of the Income Lab retirement planning software available to advisers at rates ranging from \$159 per month for a single advisor to \$139 per month for large teams of advisers.

Ubiquity and Paycor announce 401(k) partnership

Ubiquity, one of the first fintech firms to set up retirement plans for small businesses for a flat fee, is partnering with Paycor HCM, Inc., a provider of human capital management (HCM) software, to expand its market reach.

Paycor will refer small business owners and startups to Ubiquity to provide retirement benefit solutions with less of the usual administrative burden of starting a 401(k) plan.

Ubiquity also plans to rollout a suite of IRA solutions this year to meet the needs of companies where a 401(k) may offer more savings than is needed, and to satisfy state retirement plan mandates. Additionally, a Pooled Employer Plan (PEP) solution will be available.

Amber Williams to lead Lincoln ESG initiatives

Lincoln Financial Group has appointed Amber Williams, CFA, as senior vice president and head of Client Investment Strategies. She will serve as Chief Sustainability Officer, the Philadelphia-based life/annuity company has announced.

Williams will oversee Lincoln's Environmental, Social and Governance (ESG) efforts and disclosures, "guiding the continuous improvement of the environmental impact of company operations, advocating for and supporting the integration of ESG priorities across business areas and encouraging a sustainability mindset across the enterprise," a Lincoln release said.

At Lincoln since 2019, Williams developed the Client Investment Strategies team. Prior to Lincoln, she worked in a variety of investment product management and investment consulting roles at Nationwide Investment Management Group. Most recently, she served as Head of Product Management.

Williams holds a BA in Accounting from the University of Phoenix, is a member of the CFA Society of Philadelphia, and holds her Series 6, Series 7 and Series 24 securities licenses.

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