
Investnet and Achaean Financial in partnership

By Editor Test *Sat, Jun 30, 2012*

Investnet advisors will be able to use Achaean's Retirement Outcome program to create retirement income plans for their clients.

Achaean Financial has announced a partnership with Investnet that will make its Retirement Outcome system available to investment advisors who use Investnet's wealth management platform. Partial integration has begun. Full integration is scheduled for November 2012.

The advisors will be able to use Retirement Outcome to create an analysis of a client's income needs before and during retirement, then incorporate that analysis into a proposal on the Investnet platform, then populate the proposal with investment choices or annuities.

According to an Achaean release, "Retirement Outcome is an advanced, open-architecture and fully customizable retirement planning tool designed to help investors and their advisors understand the tradeoffs they face in retirement and to create personalized solutions, including appropriate spending, overall portfolio risk and allocations to guaranteed-income products.

"Retirement Outcome takes information about a client's wealth, income needs and asset allocation to produce a personalized outcome report. Each of the various investing and spending decisions can then be adjusted to help the client understand the tradeoffs they must make and how they are likely to impact income and wealth throughout retirement."

© 2012 RIJ Publishing LLC. All rights reserved.