

iPipeline
Press Release

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iPipeline Launches New Retirement Planning Solution--RetirementBuilder[®]

Solution enables advisers to demonstrate client options at retirement

UK, April 2015: iPipeline[®] - a leading provider of next-generation solutions and services to the life and pensions market - today unveils its latest development for advisers working in the pensions market, RetirementBuilder, which enables advisers to review their client's pension pot and how to best package these options at retirement.

RetirementBuilder[®] is an innovative new step-by-step retirement planning solution, which uses interactive modelling tools to display options and scenarios for an adviser to discuss with their client. The next-generation solution assists advisers with helping clients make the right decisions with their pension fund by evaluating the various factors that need to be considered, such as income, taxation and provision for dependents in a highly visual way.

RetirementBuilder also features:

- Dynamic modelling screens displaying multiple at retirement options in a simple view.
- A display of rates of growth to show how drawdown can be sustained to different ages and allows a flexible range of withdrawal and growth scenarios to be considered.
- Links to quote and apply enabling efficient straight through processing.

Version 1.0 of RetirementBuilder[®] is available now, and the service is currently free of charge for all adviser users. Further versions of the service are planned and enhancements under review include: the creation of client reports to help illustrate retirement options, needs based questions to help show which product choices are available for consideration, and further integrations with phased/income drawdown providers and platforms.

Ian Teague, Managing Director at iPipeline, stated, "Now, more than ever, it's essential that we support those advisers, who advise clients on their at-retirement options, in the most streamlined way. RetirementBuilder is an intuitive and interactive tool, which is device agnostic, so can be used in client facing situations, to help facilitate discussion." He added, "In the post budget world, showing clients what the numbers look like and how the scenarios play out is key – the more visual the information the better and technology can play a pivotal role in helping to deliver this and support all forms of guidance."

Neil Adams, Head of Pensions at Drewberry Wealth Management added, "I have been researching the market for a retirement forecast tool that considers all pension income options for a while now, and I am impressed with iPipeline's RetirementBuilder tool. Pension reviews and allocations are at the top of the financial news agenda at present, and RetirementBuilder will be invaluable post-April 2015 to advisers because it enables us to model different retirement income options to match a client's circumstances in great detail. From the initial demo, I would consider implementing this tool."

You can find out more information or register for iPipeline's RetirementBuilder[®] at www.ipipeline.uk.com.

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About iPipeline UK

iPipeline UK (previously Assureweb) is a leading provider of business intelligence, e-quote, e-application, policy delivery, and policy holder services to the UK life and pensions market. iPipeline offers the UK's broadest range of integrated and licensed solutions used by leading providers, distributors, and their IFAs via their Websites or CRM systems. To learn how you can better use iPipeline's industry-leading solutions to streamline and accelerate your business activities, visit us at www.ipipeline.com/uk.