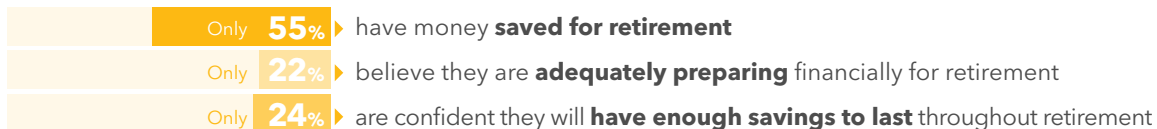


KEY FACTS & FIGURES

regarding consumer retirement perceptions

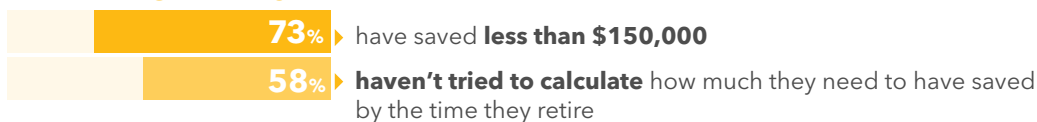
How prepared do people feel for retirement?

BABY BOOMERS



Sources: Boomer Expectations for Retirement 2016 (April, 2016), Don't You (Forget About Means): Third Biennial Study on the Retirement Readiness of Generation X

GENERATION X



The importance of a financial advisor for holistic retirement planning

90% OF BABY BOOMERS who work with a financial professional have retirement savings. Of those:



Have saved \$100,000 or more for retirement **with help of a financial professional**



Have saved \$100,000 or more for retirement **not using a financial professional**

More than **8 in 10** Boomers who work with a financial professional feel they are **better prepared for retirement** as a result of that relationship.

GENERATION X



Among **GenXers** only **3 in 10** work with a financial professional, but those that do **are twice as likely to have saved \$100,000 or more** for retirement.



Sources: Boomer Expectations for Retirement 2016 (April, 2016), Don't You (Forget About Means): Third Biennial Study on the Retirement Readiness of Generation X (March 2016)

How important is lifetime income?



Defined benefit pensions provide more than **50% OF INCOME** for more than **4 IN 10** retirees.

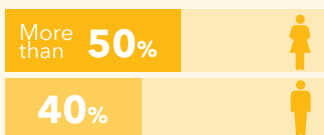


Only **1 in 4 BABY BOOMERS** expect to receive income from a pension. It is critical for those retiring in the future to accumulate enough savings to secure their own source of lifetime retirement income using annuities.

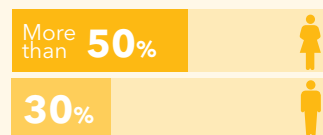
Sources: Boomer Expectations for Retirement 2016 (April, 2016), It's All About Income: Inaugural Study on the American Retirement Experience (September, 2016)

Do men feel more prepared than women?

Women express a higher level of concern about both saving enough for retirement, and being able to afford their desired lifestyle in retirement, than men do.



Concerned about **saving enough for retirement**



Concerned about **affording desired lifestyles**



Sources: Women's Perspectives on Saving, Investing, and Retirement Planning (November, 2015)

NRPW RESOURCES



National Retirement Planning Week (NRPW) materials are accessible at:
www.retireonyourterms.org under our 'Action Center' section

List of helpful materials:

- NRPW Toolkit 2017
- News Release
- List of NRPC Members
- Web Banner
- Sample Op-ed
- Newsletter Copy
- Social Media Tiles
- GIF Banner/Button

NRPW PRESS AND MEDIA



More information on NRPW Press and Media can be found on our website www.retireonyourterms.org under 'Media' section. Don't forget to share your NRPW press releases and other media mentions with Marketing and Communications Assistant, Matt Benson, at mbenson@irionline.org. We will publish the NRPW Pre-Press Release with supportive information about NRPW events and activities on March 15. We would kindly ask you to share it with others.

NRPW TEAM



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