

CreativeOne Announces Strategic Partnership with RISA® to Enhance Retirement Income Planning for Financial Advisors

CreativeOne's New Partnership with RISA Revolutionizes Retirement Income Planning

OVERLAND PARK, KS, UNITED STATES, August 15, 2023 /EINPresswire.com/ -- [CreativeOne](https://www.creativeone.com), a prominent insurance, securities, and wealth management organization, is pleased to announce its new strategic partnership with RISA®, the Retirement Income Style Awareness profile. Developed by renowned retirement income experts Wade Pfau, Ph.D., CFA, RICP® and Alex Murguia, Ph.D., RISA offers a unique retirement income framework that blends psychology and financial planning to help investors identify their individual retirement income preferences. This collaboration marks a significant milestone for both companies and is set to revolutionize retirement income planning for CreativeOne's financial advisors.



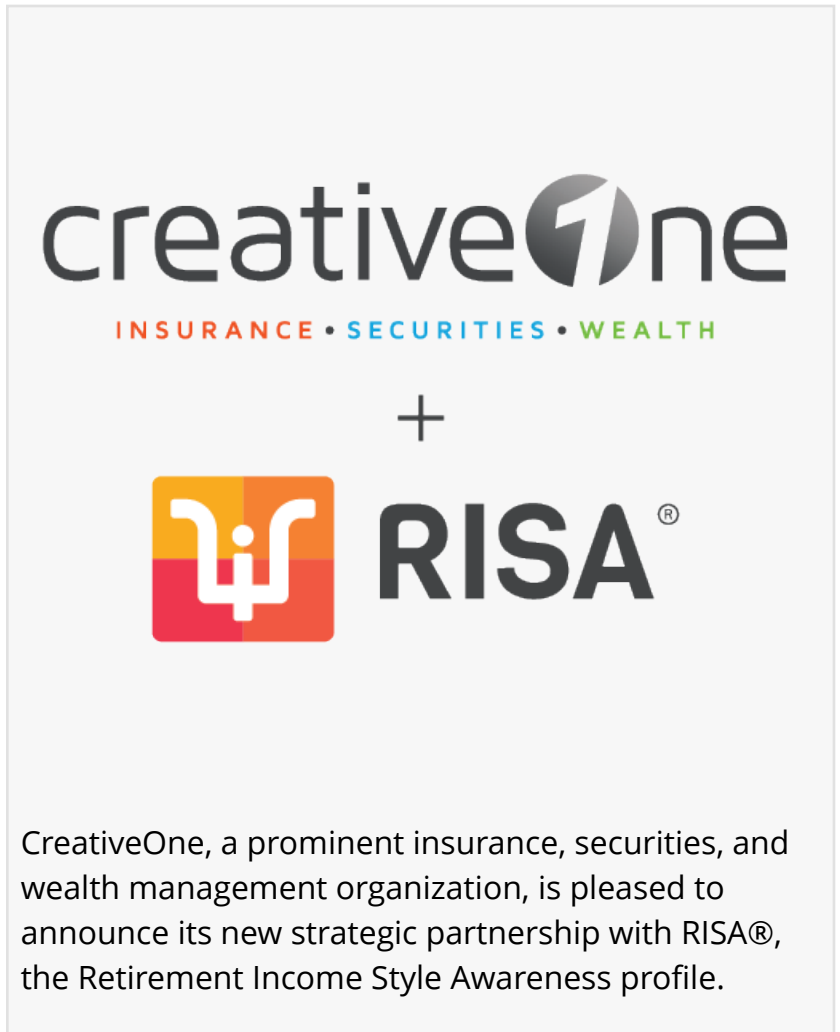
Wade Pfau Ph.D., CFA, RICP®, Co-Founder, RISA®

Through this partnership, CreativeOne aims to leverage the RISA assessment to empower its financial advisors with invaluable insights into their clients' retirement income preferences. By identifying their clients' feelings about stability, flexibility, reliance on market returns, and preferences for contractual guarantees, advisors will gain a comprehensive understanding of their clients' tolerance for income risk during decumulation.

Co-Founders of RISA, Wade Pfau, Ph.D., CFA, RICP®, and Alex Murguia, Ph.D., expressed enthusiasm for the collaboration, noting clear synergies between RISA's and CreativeOne's visions for enhanced retirement income planning.

"We're thrilled to partner with CreativeOne, a respected leader in the financial services industry. The Retirement Income Style Awareness profile is designed to complement CreativeOne's commitment to providing personalized solutions for their clients," stated Murguia. "By identifying individual retirement income preferences, CreativeOne's advisors will be better equipped to tailor retirement strategies to each client's unique needs."

Wade Pfau added, "CreativeOne's dedication to industry expertise and superior service aligns perfectly with the goals of RISA. Together, we can elevate retirement income planning to new heights and help clients achieve their financial objectives with confidence."



CreativeOne, a prominent insurance, securities, and wealth management organization, is pleased to announce its new strategic partnership with RISA®, the Retirement Income Style Awareness profile.

Through this partnership, CreativeOne's financial advisors will have seamless access to the RISA platform, enabling them to conduct intuitive surveys with their clients to determine their specific retirement income preferences. The RISA profile will provide advisors with actionable data, enabling them to implement targeted and effective retirement income strategies that suit each individual client's needs and aspirations.

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CreativeOne's industry expertise and superior service align perfectly with RISA's goals. Together, we can elevate retirement income planning, helping clients achieve their financial objectives.”

*Wade Pfau, Ph.D., CFA, RICP®,
Co-Founder RISA*

Mike Miller, President, Partner, and CEO of CreativeOne, emphasized that this partnership will play a role in bringing their larger vision for the future to life. “We are excited about integrating RISA into our offerings. CreativeOne's commitment to creating meaningful, personal relationships aligns perfectly with the RISA's goal of empowering financial advisors with the insights they need to make the most informed decisions for their clients' retirement income planning. This collaboration represents

a significant step forward in our mission to enrich the lives of financial professionals and their clients.”

For more information about this powerful new partnership, please visit <https://creativeone.com/creativeone-and-risa/>. CreativeOne financial professionals can also register for a webinar coming up on September 19 to learn more about the benefits of the RISA from Co-Founders Pfau and Murguia.

About RISA

RISA®, the Retirement Income Style Awareness profile, is built on a retirement income framework that blends psychology and financial planning to help investors identify their unique retirement income preferences. Developed by retirement income experts Alex Murguia and Wade Pfau, the intuitive, easy-to-follow survey considers a variety of factors related to an individual's feelings about security, flexibility, reliance on market returns, and preference for contractual guarantees to define their tolerance for income risk during decumulation. The RISA empowers financial advisors with the insights they need to implement the retirement income strategies that make the most sense for each individual client.

<https://risaprofile.com/>

About CreativeOne

CreativeOne is an industry-leading insurance, securities, and wealth management organization that exists to enrich the lives of financial professionals by creating meaningful, personal relationships built on proven industry expertise, superior service, and strategic solutions. CreativeOne aspires to be the one partner financial professionals rely on



Michael H. Miller, President, CEO and Partner - CreativeOne



Alex Murguia, Ph.D., Co-Founder, RISA®

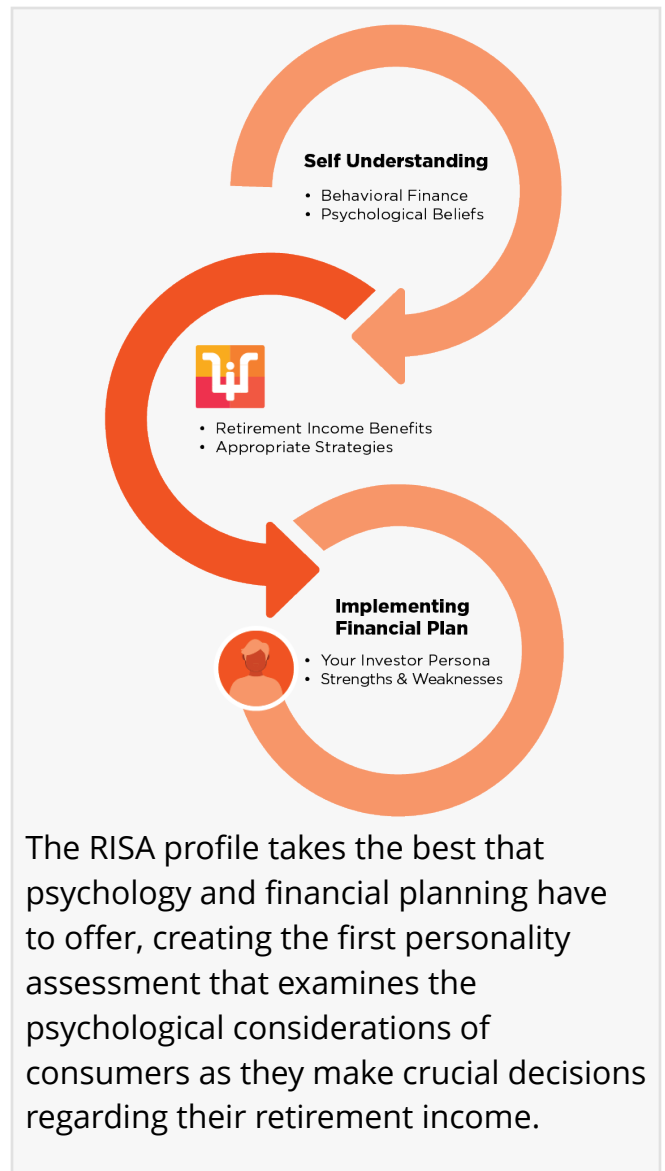
to build their practices and deliver on their clients' goals.

For more info: 800.992.2642 or www.creativeone.com.

Jessica Scheuler
CreativeOne
913-402-2176
jscheuler@creativeone.com

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