



DPL Member Profile:

Andrew Lippert, CFA®, CFP®, EA
Founder & CEO, Simplified Wealth

AUM: \$0-50M

Type: Independent RIA



Profile

Andrew Lippert became an independent RIA to focus on financial planning and provide a higher level of service to his clients. During the COVID-19 pandemic, he discovered a tool that could help determine the best solutions for building his clients' financial plans while increasing his efficiency.

New Tool



Outcome

Andrew believes due diligence is of utmost importance — the RISA® helps ensure each of his clients get just that. Using the RISA® allows Andrew to develop personalized financial plans for the pre-retirees and young professionals he serves. After nearly a year of using the tool, the RISA® has provided countless insights for both Andrew and his clients, opening their minds to strategies they may not have considered before. The RISA gives Andrew a process for making all parts of the financial plan work together, and with DPL's support, he's able to find the right solution for each client.

Highlights of the RISA® Profile



Better Insights

The RISA® Profile gives advisors quantitative insights into clients' emotional preferences — data that is otherwise inaccessible.



Retirement Plan Validation

Advisors can invite existing clients to take the RISA® to help validate and optimize their current retirement plans.



Enhanced Client Experience

The RISA® Profile can bring peace of mind and certainty to clients approaching retirement, while enhancing firms' services.

What is the RISA® Profile?

The RISA® is a psychology-backed, research-driven income personality assessment that is impacting retirement planning, available through DPL Financial Partners. It examines the factors that go into retirement income decisions to help clients identify their true preferences and define financial implementation styles. The RISA® provides greater clarity when it comes to approaching retirement planning, and facilitates meaningful conversations with clients.

“When you blend together RISA with the DPL support and platform availability, you can find the right solution for each client.”

– Andrew Lippert, DPL Member

To learn more about the RISA Profile, call 877.625.5544 to speak with a DPL Consultant.