

**DPL Member Profile:**

Shannon Stone
Griffin Black, Inc.

AUM: \$190M
Type: Independent RIA

**Profile**

Shannon Stone is a Lead Wealth Advisor, passionate about delivering exceptional outcomes as an RIA. During the recent market volatility and uncertainty, she discovered a tool to increase her value to her clients and increase certainty in the financial plan.

New Tool**Outcome**

Using the RISA® allows Shannon to bridge the gap between the technical and psychological aspects of retirement planning. After nearly a year of using the tool — and implementing it throughout her firm — the RISA® has provided countless insights into the retirement income preferences of existing and prospective clients. Research shows most retirees are uncomfortable with total return strategies for income, and are seeking new solutions. The RISA® has helped Shannon identify and develop powerful financial plans that best suit each client — total return strategy and beyond.

How To Use 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. 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.

"It's been such a great tool to use and apply with our clients, especially those who are looking at retirement in the very near future."

– Shannon Stone, DPL Member

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

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