DPL Member Profile:
Joe Flinner, Lead Wealth Advisor
Landing Point Financial Group

AUM: $150–250M
Type: Independent RIA

dpl
MEMBER

Using the RISA® for Prospecting & Creating Value for Existing Clients

Landing Point Financial Group recognizes that each client's unique personality and preferences must be considered when shaping their retirement income strategy. With their DPL partnership and use of the Retirement Income Style Awareness (RISA®) tool, the firm has differentiated themselves by offering personalized retirement income solutions that align with individual preferences rather than a "one-size-fits-all" approach often seen in the industry.

Leveraging the RISA for prospecting

The integration of the RISA has become a cornerstone of Landing Point's prospecting process. By introducing it early in the relationship, the firm demonstrates its commitment to understanding each client's needs and ensuring they'll align with retirement income recommendations.

Uncovering misalignments and opportunities

Landing Point has found the RISA to be an invaluable resource to uncover ways to improve clients' existing retirement plans. With RISA's insights, the firm has identified situations where clients were in income strategies that could be better aligned with their income style. In these cases, plans can be adjusted and improvements made, including using 1035 exchanges or rollovers into products better suited to clients' needs.

Why RISA?

Landing Point's adoption of the RISA has proven to be a game-changer in their approach to attracting new clients and creating additional value for existing clients.

By embracing the tool's ability to uncover clients' retirement income preferences and aligning strategies accordingly, the firm has enhanced their competitive advantage and strengthened their client-centric planning approach. With the support of DPL, Landing Point powerfully delivers on their promise to put client needs "at the center of every plan."

> *"I've used the RISA with many clients and had a lot of great conversations as a result. It's more than a questionnaire, it's a conversation piece."*
>
> – Joe Flinner, DPL Member

What is the RISA?

The RISA is a psychology-based income personality assessment created by retirement researchers Dr. Wade Pfau and Dr. Alex Murguia. The custom report generated by your client's responses will guide you in delivering tailored retirement income solutions.

dpl +

Learn more at dplfp.com/risa or contact us at 877.625.5544.

1906 Stanley Gault Parkway] **Louisville, KY 40223**
888.327.0049] **dplfp.com**