

# How to succeed in the Retirement Revolution

The retirement landscape has shifted. Clients are thinking differently about later life. Advisers and planners need to think differently too.











*“Real wealth is never about money – it’s about being in control of your life and avoiding anxiety.”*

Sarah Lyons, Chief Customer Officer

## What’s changed for advisers:

-  New regulatory pressures and much more scrutiny on customer outcomes
-  More sophisticated retirement strategies required to navigate increasing tax, estate planning and decumulation complexity
-  Rising expectations on transparency, governance and oversight
-  Greater need for proactive, year-round financial planning
-  Competition from digital-first and AI-enabled advice models

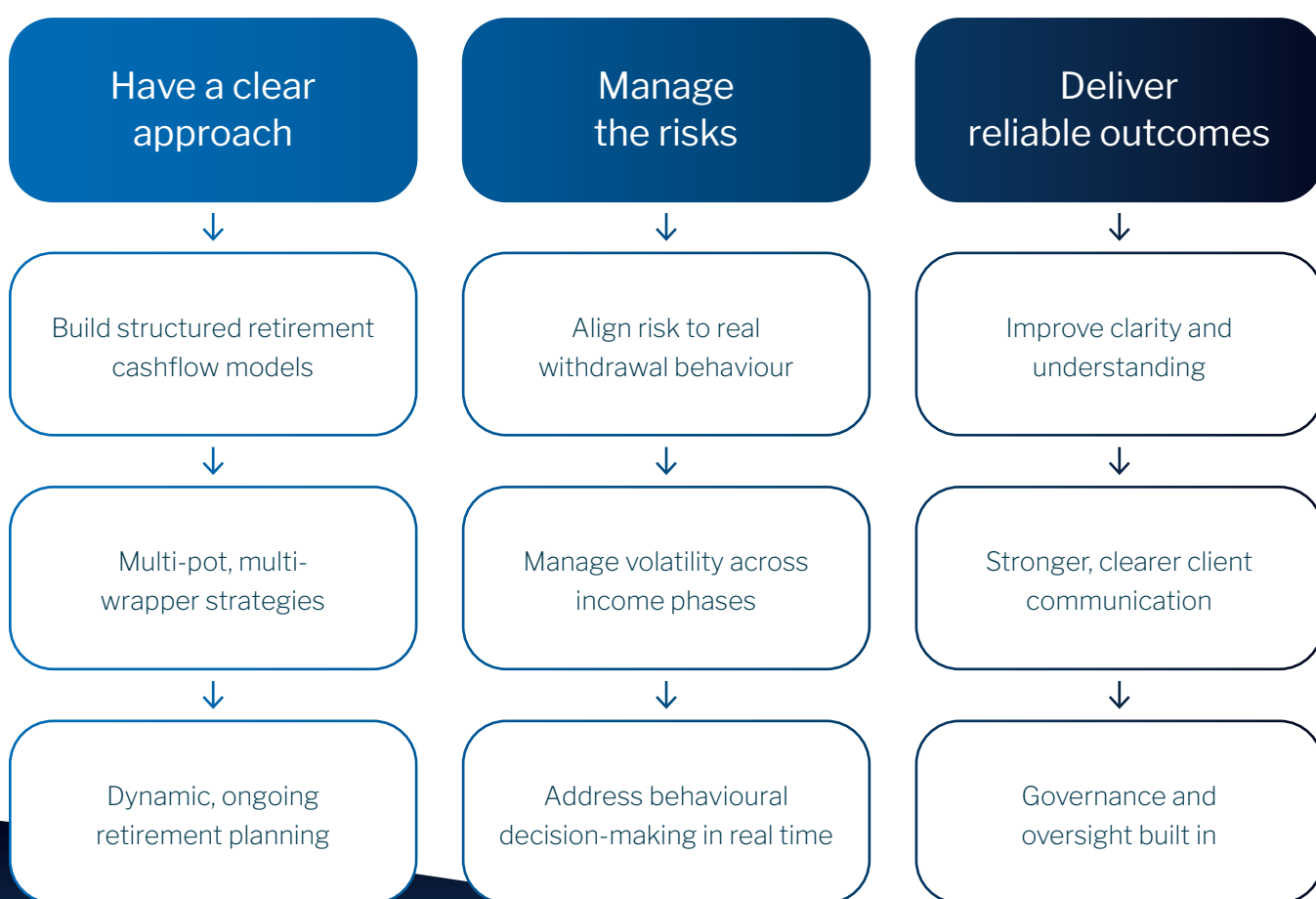
## What’s changed for clients:

-  State Pension confidence is weakening
-  Pension age continues to rise
-  Property is no longer viewed as a guaranteed retirement safety net
-  Retirement income is harder to predict
-  Safe withdrawal rates are increasingly uncertain
-  More clients are supporting both children and parents
-  “Hard stop” retirement is disappearing
-  Behavioural biases continue to affect decisions under stress

The old model no longer fits reality, and you can't navigate a new world with old maps. Clients need clarity. Advisers need confidence. Retirement needs a new approach.



## Our simple roadmap for revolutionary retirement advice



## Join the retirement revolution with Parmenion

**Let's Talk:** for more retirement expertise reach out to the Parmenion team.

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