T. Rowe Price

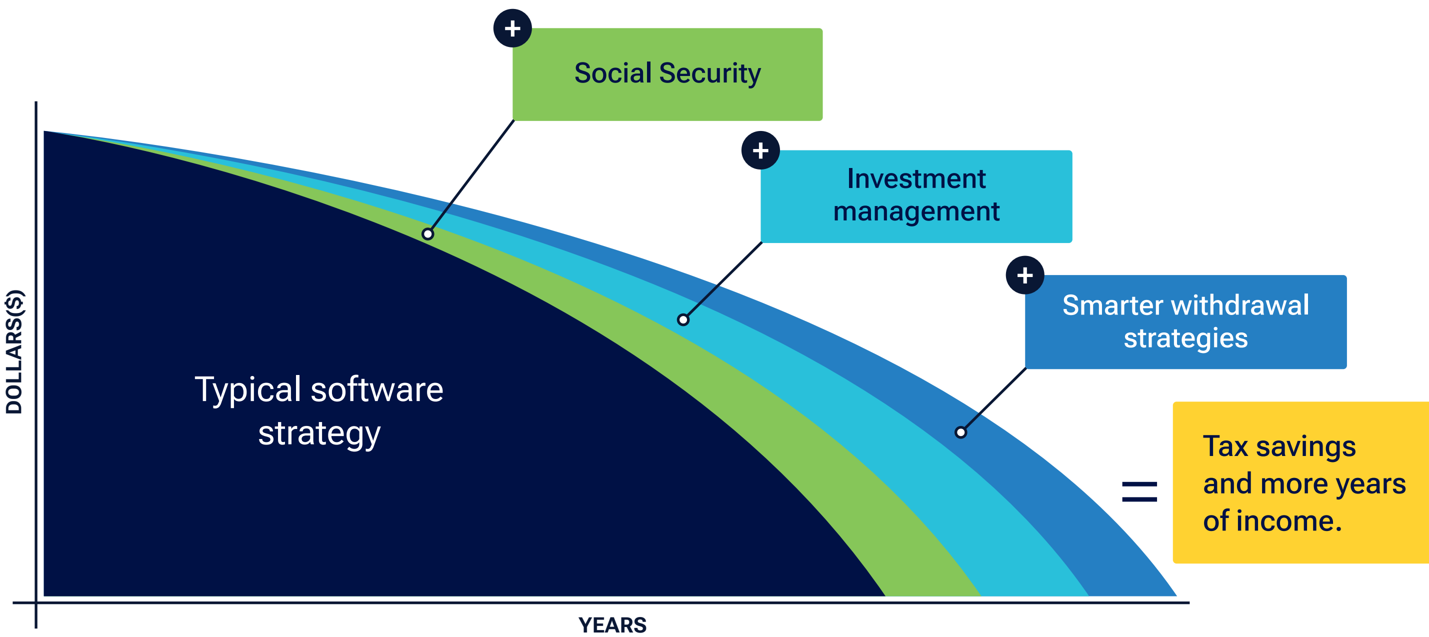
Income Solver®

Turn complexity into confidence

A lot goes into paying for retirement. However, conventional guidance can miss key factors – like seeking to optimize Social Security, investment management, and withdrawal strategies simultaneously to craft more comprehensive income plans for your clients.

Extend retirement income by up to 7 years

According to a recent study, Income Solver's personalized plans can deliver tax savings and up to 7 more years of retirement income compared to conventional approaches. To learn more, see our whitepaper.*



Streamline your planning process:

Analyzes thousands of scenarios and provides easy-to-implement trade instructions.

Consolidate household assets:

Surfaces held-away accounts that may otherwise be overlooked.

Complement your core financial planning:

Complements tools like MoneyGuide®, eMoney®, and more.**

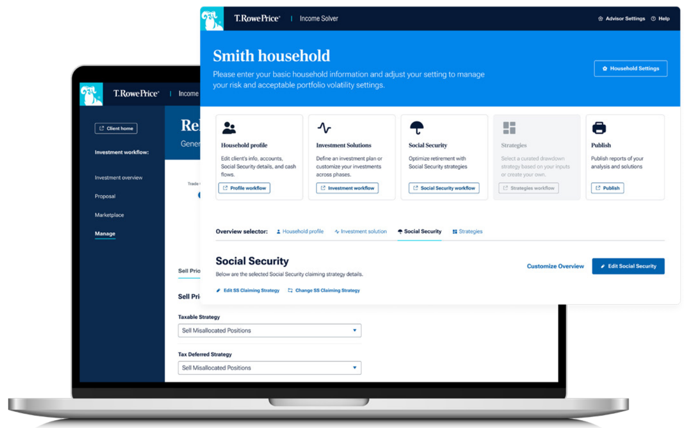
Harness our advanced methodology

Income Solver employs a multi-dimensional strategy that seeks to help minimize taxes, optimize your client's withdrawal sequence, and maximize Social Security benefits. Our software projects more years of funded retirement and thousands of dollars in tax savings over conventional wisdom approaches.

Join our weekly live demo and get 14-day trial access.

Every Wednesday at 3:00 PM ET

[Register Now]



Interested in purchasing an Income Solver software subscription for your team or company?
Email us at [AdvisorServices@troweprice.com]

RETIRE WITH CONFIDENCE®

Leverage our **Solving the Retirement Income Puzzle** practice management program—featuring presentations, workbook, client handouts, and more—alongside Income Solver to meet evolving client needs and differentiate your practice.

*This analysis, from "Outsmart conventional planning to extend retirement income by up to 7 years for your clients," draws data from over 5,700 households that have used Income Solver via a retail advisory service offered by one of our affiliates. Each household's assets under management (AUM) were categorized into taxable, tax-deferred, and tax-free segments. For our evaluation, we reviewed three representative AUM profiles: the 50th percentile ($2.25M, average), the 90th percentile ($4.5M, high net worth), and the 10th percentile ($500,000, lower AUM). In our study, the Income Solver approach generated up to seven or more additional years of retirement income compared to conventional strategies. For the purposes of this whitepaper, we focus on the $2.25M mass affluent and $4.5M high net worth examples. All households used for analysis assumed moderate market returns with a 60/40 stock-bond ratio across accounts, with spending levels and Social Security PIAs estimated as appropriate for each household asset band. While individual results may vary depending on their assets held, spending needs and life expectancy, the examples provided in this analysis are indicative of the households that have used the tool. The retirement income projections or other information regarding the likelihood of various outcomes used in this study are hypothetical in nature, do not reflect actual results and are not guarantees of future results. The study is based on certain assumptions, and there can be no assurance that the projected results will be achieved or sustained. Actual results will vary and over time, depending on changes to inputs or updates to the underlying assumptions, and such results may be better or worse than the results shown. You should be aware that the potential for retirement income shortfalls may be greater than demonstrated in the study.

**Retiree Inc. is not affiliated with MoneyGuide® or eMoney®.

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