






# How satisfied are retirees?

We surveyed retirees who participated in 401(k) plans


**More satisfied than they expected.  
And satisfaction increases.**

 New retirees are anxious about income and health care expenses


 Some concerns diminish with time

 **Exception:** Concerns about health hold steady

**69%** pre-retirement    **69%** post-retirement

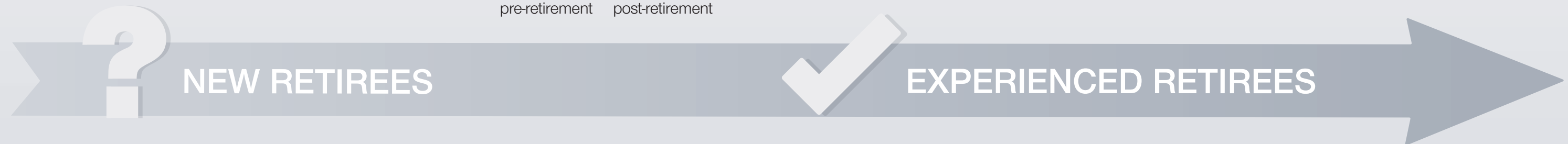
 Experienced retirees are

- generally happy
- in good financial shape
- optimistic about the future

 They're making progress toward financial goals:

**95%** maintaining an acceptable quality of life

**95%** maintaining and budgeting for everyday expenses



## For ALL retirees, predictability of income is key

Top financial objectives:

 **65%** retirement income that is predictable

 **65%** guaranteed income later in life

**BUT** 75% say annuities are “not very attractive” or “not attractive at all”



Retirees want help

- for creating and managing a plan
- for tracking progress


**70%** want help/advice for converting assets into a stream of income for retirement

Top and bottom 3 advice attributes

 **83%** Is easy to use

**78%** Alerts you to critical developments in your account

**65%** Includes a relationship with a specific professional advisor

 **44%** Includes referrals to other financial professionals

**40%** Includes digital prompts and updates to help keep you on track

**26%** Is accessible on mobile devices