



T.RowePrice

NEWS RELEASE

T. ROWE PRICE UNVEILS INNOVATIVE SOCIAL SECURITY TOOL FOR ADVISORS

The Social Security Analyzer tool and “Power of Social Security” program are among the firm’s latest resources to help financial advisors incorporate research-based guidance and personalization into retirement income planning

BALTIMORE, April 1, 2025 - T. Rowe Price (NASDAQ-GS: TROW), a global investment management firm and leader in retirement, has launched [Social Security Analyzer \(SSAnalyzer™\)](#), a tool designed to help financial advisors optimize their clients’ benefits by building custom strategies, conducting in-depth analysis, and providing side-by-side comparisons among various Social Security claiming strategies. The tool comes as a [new T. Rowe Price survey](#) revealed retirement savers, including pre-retirees, lack a basic understanding of Social Security benefits, underscoring the urgent need for a resource like this.

SSAnalyzer, which is free to advisors, is designed to factor in complex life scenarios. This includes evaluating spending needs against Social Security income; viewing lifetime, annual, and monthly income; evaluating longevity risk with several life expectancy outlooks; and analyzing the potential impact of taxes, cost of living adjustments, and inflation.

As a companion to SSAnalyzer, T. Rowe Price has developed “[The Power of Social Security](#),” a comprehensive program aimed to provide advisors with a range of foundational content to help them navigate the complexities of Social Security benefits with their clients. Its resources include continuing education videos, presentations, and white papers for advisors, as well as a library of presentations, workbooks, and articles for clients.

“We know anecdotally and from our recent survey that there is meaningful confusion around Social Security benefits and claiming strategies,” said Kevin Collins, head of U.S. Intermediaries at T. Rowe Price. “T. Rowe Price’s SSAnalyzer and ‘The Power of Social Security’ can be vital resources that will help advisors create customized approaches with their clients, which can lead to better personal outcomes in retirement.”

The launch of both SSAnalyzer and “The Power of Social Security” are the latest examples of how the firm continues to garner substantial value for clients through [the acquisition of Retiree, Inc.](#), alongside T. Rowe Price’s decades of experience as a retirement leader. The launch of SSAnalyzer follows the 2024 launch of [Social Security Optimizer](#), a tool specifically designed for T. Rowe Price individual investors and 401(k) plan participants.

“The addition of SSAnalyzer and other resources to T. Rowe Price’s suite of retirement solutions underscores our commitment to empowering our advisors and retirement savers with knowledge and tools to make more informed decisions,” said Michael Davis, head of global retirement strategy at T. Rowe Price. “Integrating these tools into their practices will enhance the value-added services advisors offer their clients and give clients more confidence about the future.”

ABOUT T. ROWE PRICE

Founded in 1937, T. Rowe Price (NASDAQ – GS: TROW) helps individuals and institutions around the world achieve their long-term investment goals. As a large global asset management company known for investment excellence, retirement leadership, and independent proprietary research, the firm is built on a culture of integrity that puts client interests first. Clients rely on the award-winning firm for its retirement expertise and active management of equity, fixed income, alternatives, and multi-asset investment capabilities. T. Rowe Price serves millions of clients globally and manages US \$1.63 trillion in assets under management as of February 28, 2025. About two-thirds of the assets under management are retirement-related. News and other updates can be found on [Facebook](#), [Instagram](#), [LinkedIn](#), [X](#), [YouTube](#), and troweprice.com/newsroom.

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