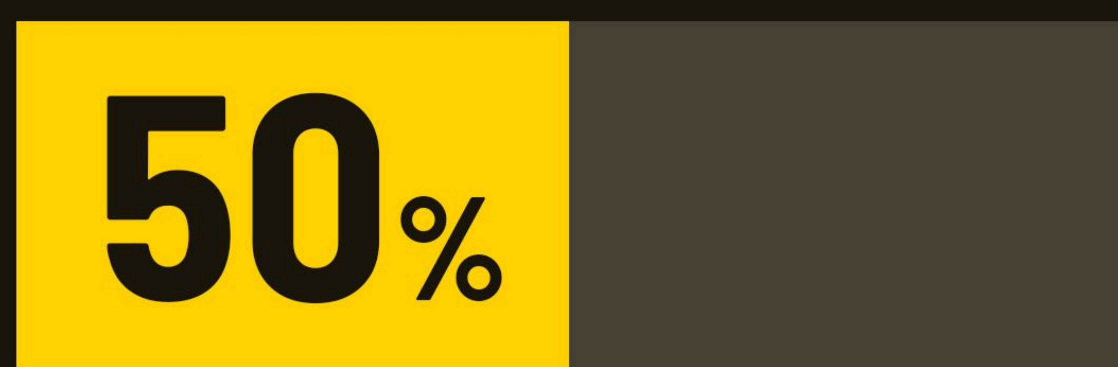
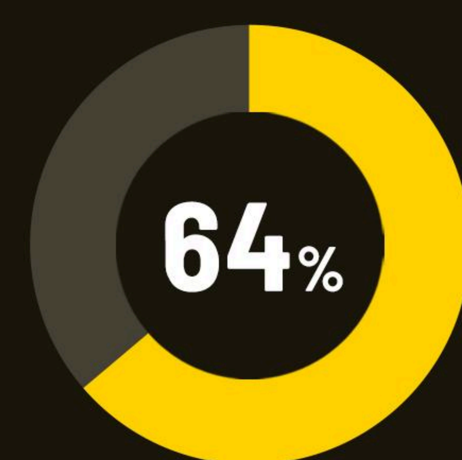
2025 PROTECTED RETIREMENT INCOME & PLANNING STUDY, CHAPTER 1

The Alliance for Lifetime Income is releasing the first chapter of its Protected Retirement Income and Planning (PRIP) annual study. The new data reveals that due to financial market volatility, persistent inflation, and increased concerns about the viability of Social Security, Peak 65® consumers are delaying retirement & changing their investment strategies.

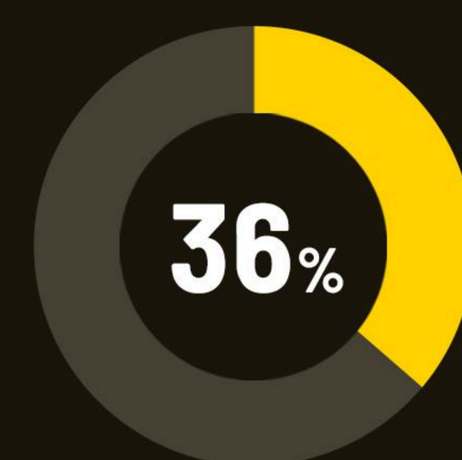


of financial advisors are putting more client investments into annuities, which ranks as the most popular change

If they inherited $100,000 today, **64%** of consumers said they would put that money into an annuity versus **36%** into the stock market.



Would put their money in an annuity



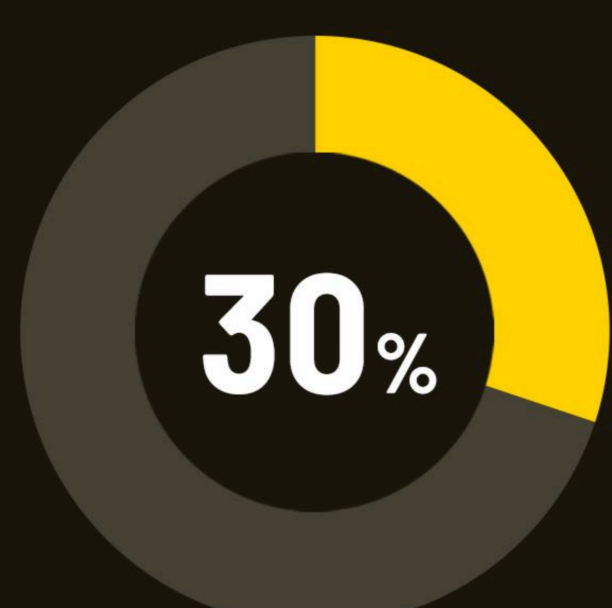
Would put it in the stock market

ALMOST 2/3

of financial advisors (65%) changed their retirement planning approach over the past year to address client concerns about market volatility, inflation, and rising interest rates.

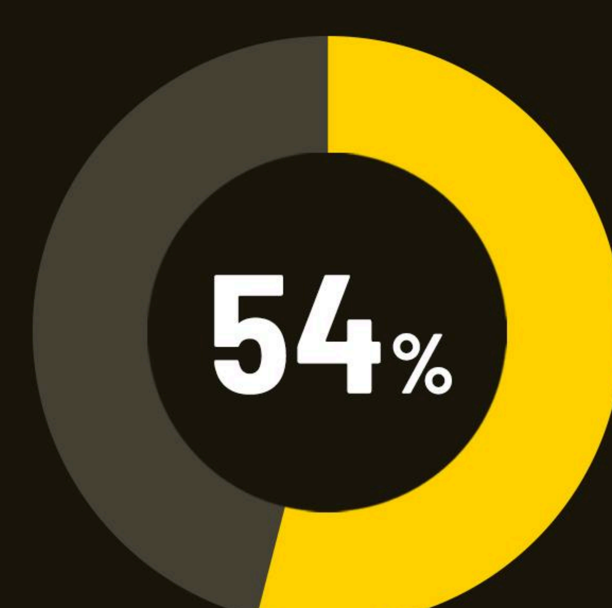
ALMOST 1/3

of Peak 65® consumers are contemplating postponing retirement.



OVER HALF

of Baby Boomers and Gen-Xers are fearful of outliving their savings in retirement.



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