

Personalized Retirement Guidance Delivers Measurable Results at Scale

CASE STUDY

Client: Top 10 Retirement Recordkeeper

Solution: retireSAVVI

The Challenge: Shifting from Accumulation to Retirement Income Retention

To differentiate and retain assets, the recordkeeper needed to extend the platform beyond accumulation. The goal was to help participants transition confidently into retirement while strengthening long-term engagement and in-plan asset retention.

- **Limited Guidance:** Participants lacked personalized retirement income guidance
- **Asset Retention:** Earlier engagement was needed to reduce asset leakage and keep participants in-plan
- **Platform Differentiation:** Expand the platform's value beyond accumulation

The Approach: Frictionless, Optimization-Driven Income Planning

The client implemented retireSAVVI, a real-time personalized retirement income solution powered by an optimization engine that models tax-efficient withdrawal strategies. Following a successful pilot, the recordkeeper accelerated to a full enterprise rollout after just three months.

What Employees Value Most About retireSAVVI²

Total Wealth Visibility:

View retirement accounts, pensions, assets, liabilities, and outside accounts in one place

Frictionless Experience:

Receive personalized guidance without lengthy questionnaires or advisor meetings

Tax-Efficient Income Planning:

Optimize withdrawal sequencing, Social Security timing, and tax outcomes

The Results: Measurable Outcome at Scale

930K+participants guided to date¹**12%**increased contributions¹**50%**plan financial changes²**70%**would use retireSAVVI again²

Guidance that works. Decisions that pay off. Let's find the right solution for you.

Visit [savvifi.com](https://www.savvifi.com) to learn more, or give us a call at **781-583-7011**.

About SAVVI Financial

SAVVI Financial provides expert, personalized decision intelligence to help employees navigate complex financial milestones, from open enrollment benefit choices to structural retirement income strategies. Integrated seamlessly within existing enterprise and recordkeeper platforms, SAVVI utilizes ethical AI and advanced logic engines to lower administrative burdens, mitigate asset leakage, and build long-term financial security at scale. Learn more at www.savvifi.com.

¹ May 2026 report, 90% participants increased contributions with 10% taking other actions for retirement optimization.

² June 2026 CSAT report for retireSAVVI.