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Web-Based Retirement Needs Planner Helps Securities America Advisors Tap Distribution Market

OMAHA, NE – Aug. 6, 2009 – Securities America and Wealth2K® recently released Retirement Time™, a web-based application designed to help financial advisors maximize their prospecting and sales success in the Rollover IRA and retirement income distribution markets. Retirement Time builds on the The Income for Life Model® retirement risk assessment process that was introduced in 2007. The process was developed in conjunction with Securities America's NextPhase™ Income Distribution System.

"To a large extent, the arbiter of an advisor's success in the retirement markets will be how well he or she is able to communicate to a large and fluid universe of prospective clients," said Paul Lofties, Securities America, Inc., first vice president of acquisitions and wealth management. "We wanted to offer our advisors a way to do that, using cutting-edge interactive tools and multimedia presentations to set them apart from their competition."

According to Wealth2K Founder and CEO David Macchia, advisors find themselves in a high stakes, multi-faceted competitive struggle for investors' retirement assets. "To attract more investors to their retirement products and services, advisors must introduce high-end, high-impact communications tools that convey rich and motivational educational experiences," Macchia said.

Securities America and Wealth2K have again joined forces to address this need with the introduction of Retirement Time. The innovative application offers consumers calculators and other tools including *Seminar for One*™ technology designed to help them anticipate their needs in retirement. It also provides educational videos such as *The Power of an IRA Rollover* and *IRA Rollover Options to Consider*. Additionally, the *Seminar-for-One* provides a comprehensive look at retirement needs and the funding model offered by The Income for Life Model. Advisors who use the platform link to it directly from their own website and can customize it with their name and contact information.

Advisors may underestimate the competitive threat posed by big brands that are investing heavily in cutting-edge IRA and retirement income websites. According to Macchia, it's not unusual for advisors to think of their competition as coming from other independent advisors.

"That's valid, but it's only part of the story," he said. "The big brands are targeting advisors' clients, and they are using impressive, web-based communications technology to express the value of their products and services. Advisors who fail to recognize and manage this competitive threat do so at their peril."

About Securities America

Headquartered in Omaha, Nebraska, Securities America, Inc. has more than 1,900 financial professionals nationwide with more than $34 billion in client assets under their supervision. Securities America Advisors, Inc. is an SEC-Registered Investment Advisory firm with more than $11.2 billion in assets under management and administration that offers investment management, financial advice and financial planning through financial advisors. As the business growth expert, Securities America's mission is to foster the success of financial professionals so they can provide quality, objective counsel and services to their clients. Additional information is available at www.securitiesamerica.com.

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