



Retirement Analysis SOFTWARE

Many people do not know how much income they will need in retirement. According to the 2008 Retirement Confidence Survey®, fewer than half of workers (47 percent) have attempted to calculate how much money they'll need to retire comfortably.¹

OnTrak™ is retirement analysis software designed to help your clients understand and manage their post-retirement situation. OnTrak™ can serve as a roadmap for retirement planning, by helping your clients get on track, or remain on track, to meet their retirement income needs.

The easy-to-use software allows you to input your client's data. This data is then used to produce a customized status report that you can use to help your client better understand their post-retirement needs.

You can provide your clients with:

- A personalized analysis based on their retirement income desires and needs.
- A year-by-year retirement income summary.
- A chance to address potential income problems before they occur.

With OnTrak™ you can:

- Increase client satisfaction.
- Improve client retention.
- Generate referrals.
- Gain a share of the growing retirement market.
- Boost overall sales.
- Possess different approaches for presenting insurance solutions.

OnTrak™ is not a product you can sell; it's a solution you can offer your clients. Using OnTrak™ software, you can help your clients reduce their stress and possible confusion about post-retirement income needs.



To request a free OnTrak™ software trial, call URL Insurance Group - One Stop Brokerage at 800-962-8875.

¹Employee Benefit Research Institute and Mathew Greenwald & Associates, Inc., 2008 Retirement Confidence Survey.®

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