



22 KEY PHRASES

FOR 2022

Every time you meet with clients, you're either making or breaking connections. These insight-based phrases are what clients want to hear,* and can help you engage in more meaningful conversations.



ESTABLISH YOUR CREDIBILITY

- 1 Our commitment
- 2 Track record of success
- 3 Security
- 4 We believe physical and financial well-being go hand-in-hand
- 5 Added value to your retirement plan at no additional cost

APPEAL TO EMOTIONS

- 6 Go from cautious to confident
- 7 Protect your life's hard work for your life ahead
- 8 Quality of life
- 9 Peace of mind
- 10 Feeling prepared and protected
- 11 Your future on your terms
- 12 The financial future you and your family deserve
- 13 Family, finances, future
- 14 Instill confidence in uncertain times
- 15 What do you want your life to look like in 10 years?

PLAN FOR SUCCESS

- 16 A balanced portfolio that includes select assets that adapt to changing needs
- 17 Plan and protect against uncertainty
- 18 Simple steps now for a more secure future
- 19 Strong and steady long-term strategy
- 20 Living well tomorrow starts today
- 21 Plan for your family's multi-generational financial well-being
- 22 A strategy to maximize living long and living well

* Based on qualitative industry research by Storyline Strategies (formerly known as Luntz Global Partners) in March, 2022.



MORE 2022 INSIGHTS* TO KEEP TOP OF MIND



Financial professionals are reading cues from clients that there's an appetite to connect with clients on a deeper level, putting them in an aspirational mindset beyond just saving for retirement.



An investor study showed that being "comfortable" was much more important than painting a big "dream" retirement — they have a more realistic sense of what they want. It's about living longer and being healthy, knowing you've saved enough to be comfortable and spend time with those important to you.



The most useful materials offer a simple, bottom-line understanding, like income calculators and road maps. In a small sample group of financial professionals, we found that written materials can be helpful for clients to receive in some cases, but are rarely used during client meetings.



Current socioeconomic conditions and generational disparities are blurring the lines of when clients are looking to grow vs. preserve wealth. Portions of assets with different risk levels and longevity targets that can achieve both and adapt to both the needs of the individual and their future generations are important.

Let's start the conversation.

 **Visit:** transamerica.com

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