Top 5 Reasons RIAs Turn to Advisory Annuities & Life Solutions

Protect more. Simplify more. Deliver more.

Advisory annuities and life solutions help planners strengthen client outcomes with lower friction, clearer economics, and modern features that fit the fee-only model.

1 Lower Costs, Greater Flexibility

- Reduce internal expenses vs. traditional investment structures.
- Many advisory solutions eliminate surrender charges, offering greater liquidity.
- Align protection with planning without disrupting fee workflows.
- No annual membership fee.

2 Stronger Benefits & Better Outcomes

- Access income guarantees, downside buffers, and enhanced growth potential.
- Provide modern alternatives that weren't available when clients made past decisions.
- Improve resilience for retirees and pre-retirees with transparent, advisory-class options.

3 A Clear Competitive Advantage

- Differentiate your firm with protection and income solutions that complement AUM.
- Strengthen retention by meeting evolving client needs before competitors do.
- Present a comprehensive, planning-aligned framework, not a product pitch.

4 Expand Your Offering Without Adding Complexity

- Access fixed, indexed, RILA, and variable annuities — all in advisory form.
- If you're unlicensed, we execute under our license; if you're licensed, we integrate.
- Add recurring advisory revenue while maintaining fiduciary alignment.

5 Turnkey Execution With a Senior-Level Team

- RIA Fiduciary Solutions handles suitability, paperwork, e-apps, and servicing.
- Experienced, senior case designers (not junior desks) support the entire process.
- Clean data exports feed back into your planning and reporting systems.

Built for RIAs.

Designed around your planning process.

Partner with RIA Fiduciary Solutions to deliver protection & income strategies that strengthen your clients' plans — without adding operational drag.

Call us today:

888.673.9499

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