



## NEWS RELEASE

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### **Alliance for Lifetime Income and CANEX Form New, Industry-Leading Retirement Income Research Partnership**

*The two organizations will combine efforts to produce best-in-class retirement income research on consumers and financial professionals.*

**WASHINGTON, D.C., April 8, 2021** — The Alliance for Lifetime Income, a non-profit consumer education organization, and CANEX, a leading annuity pricing, data and research firm, are joining forces to conduct groundbreaking new research on protected income planning and annuities.

The new joint research effort aims to provide new and unique insights that can help educate both consumers and financial professionals about the use of annuities for protection and growth during retirement. The research partnership combines CANEX's industry expertise in supporting the pricing and research needs of financial professionals and financial institutions with the Alliance's deep knowledge and understanding of consumer behavior and sentiment related to annuities and retirement income planning.

The topics this new research will explore include:

- Retirement and protected income planning behaviors and trends
- Perceptions, understanding, and use of annuities in retirement planning
- Importance and value of protection within modern retirement portfolios
- Shifts in retirement planning due to changes in the industry, the pandemic and other recent events

Both organizations bring a history of research, data and industry thought leadership to the partnership, including long-running annual efforts such as the Alliance's Protected Lifetime Income study and the CANEX/Greenwald Guaranteed Lifetime Income study. Both pieces of past research, together with CANEX's annuities data, will provide critical inputs, insights and historical tracking to the new findings.

"Our new partnership with CANEX will be a trailblazing research effort in the retirement industry," said Jean Statler, CEO of the Alliance for Lifetime Income. "It comes at an ideal time because of the retirement reset underway in America, which is leading more and more Americans to protected income. Consumers are increasingly looking for new ways to save, grow, and protect their retirement investments. Annuity manufacturers are innovating new products to meet the evolving consumer demand, and financial professionals need to evolve, or risk being left behind. Our combined research program will create a unique new body of knowledge to help connect the desires of consumers with the products and services available to

financial professionals interested in keeping assets under management and growing their practices.”

“This partnership allows us to combine our strengths and build on the findings from both our past studies,” said Tamiko Toland, Director of Retirement Markets at CANNEX. “Our experience in working as a bridge between annuity manufacturers and distributors gives us a perspective into the design and positioning of annuities that informs this research and gives us the opportunity to uncover valuable new insights. Joining forces, we’re able to better understand the ways that financial professionals use annuities in retirement planning and reveal more areas where the perception of those professionals and their clients are in line or diverge.”

**About the Alliance for Lifetime Income**

*The Alliance for Lifetime Income is a non-profit 501(c)(6) educational organization based in Washington, D.C., that creates awareness and educates Americans about the value and importance of having protected lifetime income in retirement. Our vision is for a country where no American has to face the prospect of running out of money in retirement. The Alliance provides consumers and financial advisors with educational resources, interactive tools, and actionable research and insights to use in building retirement income strategies and plans. We believe focusing attention and conversations on retirement income that lasts throughout life leads to greater retirement security for millions of Americans. Learn more at [www.allianceforlifetimeincome.org](http://www.allianceforlifetimeincome.org) and [www.ProtectedIncome.org](http://www.ProtectedIncome.org).*

**About CANNEX**

*CANNEX Financial Exchanges Ltd. is a leading provider of pricing, data and research for retirement and savings products in North America. In the U.S. the firm helps bridge the gap between annuity product manufacturers and financial professionals in simplifying and communicating the unique value that each product provides and improving the effectiveness and efficiency of planning, sales and service processes. Learn more at [www.cannex.com](http://www.cannex.com).*

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