



DPL Member Profile:

Andrew Lippert, CFA®, CFP®, EA
 Founder & CEO, Simplified Wealth

AUM: \$0-50M
 Type: Independent RIA



Using RISA® as a first step in the planning process

As a holistic financial planner, Andrew Lippert is focused on growing his business with efficient tools that improve client outcomes.

“Step one is creating awareness,” says Lippert. “Every client is different, so understanding their unique needs is key to building a plan they can stick with.”

Knowledge is power

The Retirement Income Style Awareness® (RISA) profile — a complimentary member tool that transforms retirement planning conversations and outcomes — empowers him to do just that.

The custom report generated from his clients’ answers guides Lippert in delivering tailored retirement income solutions, including fiduciary friendly annuities.

RISA to the rescue

“I have one client retiring this calendar year who has no pension or type of guaranteed income stream beyond social security,” he says. “Naturally, she wants a bit more.”

Using the RISA profile, Lippert was able to offer potential solutions that solve for retirement in ways she’s comfortable with.

“RISA helps reveal and quantify my clients’ true feelings about solving for retirement,” says Lippert. “It creates a repeatable framework, almost like bumper lanes, that guide us down the right path every time.”

“Step one is creating awareness. RISA helps reveal and quantify my clients’ true feelings about solving for retirement income.”

– Andrew Lippert, DPL Member

What is RISA?

RISA is a psychology-based income personality assessment created by retirement researchers Dr. Wade Pfau and Dr. Alex Murguia. Your client’s responses reveal their unique preferences for sourcing retirement income and a custom report guides you in delivering tailored retirement income solutions.



Learn more at dplfp.com/risa or contact us at 877.625.5544.