DPL Member Profile:
Bob Witt, Financial Advisor
Savant Wealth Management

AUM: $5B+
Type: Independent RIA

MEMBER

Using RISA® to validate existing plans during market volatility

Market volatility can be a wakeup call for financial advisors. When some of his clients became concerned over market fluctuations, Bob Witt knew it was time to re-evaluate their retirement plans and portfolios.

"It's important to align clients with strategies that work for their unique personalities," he says. "The solution that looks best on paper might not be one they're able to stick with during tough times."

RISA to the rescue

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 Witt in delivering tailored retirement income solutions, including fiduciary friendly annuities.

Knowledge is power

"Some clients suggest that they're patient, long-term investors," he said, "but have some behavioral predispositions when it comes to investing. Others are openly distrustful of the markets and simply want a different way to invest."

"We have a fiduciary obligation to present unbiased solutions," says Witt. "That means looking at all the potential solutions and finding the best mix for each client."

"RISA does the heavy lifting," he adds. "The research-backed profile helps determine the different types of retirement income personalities so we can provide a customized solution clients can stick with."

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– Bob Witt, DPL Member

What is RISA?

RISA is a psychology-based income personality assessment created by retirement researchers Dr. Wade Pfau and Dr. Alex Murguia. The custom report generated by your client's responses will guide you in delivering tailored retirement income solutions.

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

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