Advisys and The National Underwriter have combined efforts to create a new, completely integrated product on retirement planning called NuAnswers.

The Advisys platform, known as Back Room Technician, is used by financial planners, producers and advanced markets professionals today in both large financial services firms and small offices with just one professional. The product consists of hundreds of client presentations and client-ready handouts on topics related to retirement planning. The handouts are not only visually appealing but explain difficult financial planning concepts in an easily understood format. Since the product is used by some of the country’s largest financial services firms, all the handouts and presentations have been reviewed and approved by financial service firm compliance departments for accuracy and representations made to the client. Second, Advisys conducts high quality webinars throughout the year on important and trending topics such as social security planning, health savings accounts and small business succession planning. The Nuanswers product allows subscribers to easily register and access these webinars from the subscriber’s desktop.

The National Underwriter Company has teamed with Advisys to add relevant, accurate and easy to understand research and technical content related to retirement topics. The editorial team at The National Underwriter Company has added tax-related research content to NuAnswers from its flagship product Tax Facts as well as relevant research material from its Tools and Techniques series and other leading publications such as Social Security and Medicare Facts and Health Reform Facts. Financial professionals will now have the ability to quickly find answers to tax questions concerning retirement topics across a broad range of issues. For example, suppose you are meeting with a client about his upcoming retirement and what options he may have with his 401(K). The NuAnswers product will allow you to quickly find the answers to likely tax questions from the client regarding lump sum distributions, rollovers and required minimum distributions before your meeting. At the meeting, you will be prepared for his questions and also able to provide him with high quality compliance approved literature on the various aspects of 401(k) planning along with a handout summarizing his options.

The product uses the Backroom Technician platform and information is arranged by topic and sub-topic allowing for an easy to use menu driven approach to quickly find both succinct tax research content and client ready presentations and handouts. The research content and client presentations are grouped together on the relevant retirement sub-topic making it easy to find all the relevant information in one place. The retirement topics include: Health and Medical, Income Sources, Investments and Protecting Finances. Each of the topics have sub-topics allowing the customer to “drill down” to a specific issue dealing with retirement planning. The product is also searchable and allows the customer to pre-set favorites on any number of topics.