



## Benefits of working with a financial advisor

### Financial outcomes — higher balances

Worked with a financial professional



**\$40k**

Median account balance

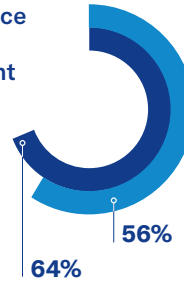
Did not work with a financial professional



**\$21k**

Median account balance

Confidence meeting retirement goals



Confidence in investment choices



Those who worked with a financial professional are more confident in meeting their retirement goals and in their investment choices than those who did not.

### Investing behaviors — contribute more & earlier

Worked with a financial professional



**\$5,016**

Mean annual contribution

Did not work with a financial professional



**\$3,372**

Mean annual contribution

**24%**

Those who worked with a financial professional **increased their contributions 24% more frequently** than those who did not.

Because of a financial professional...

Agree their account balance is higher



Agree they started contributing sooner



### Emotional benefits — greater satisfaction

Satisfaction with 403(b) plan



Satisfaction with account performance



Financial professional helps make investment decisions that are best for you



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