Adapt and send the following text to financial advisors in your organization who may be interested in participating in AgeLab PLAN research!

Dear advisors –

The financial industry is undergoing profound change. A recent study by our partners at the MIT AgeLab uncovered insights into how financial clients are thinking about and experiencing these unprecedented times, and the future of advice. As advisors, you have the unique opportunity to help build upon these findings and further explore how longer lifespans, new technologies, and societal events like COVID-19 may be impacting and transforming the advice industry.

Along with our partners at the MIT AgeLab, we invite and encourage you to join **PLAN (Preparing for Longevity Advisory Network)**. The objective of PLAN is to develop insights from the field to inform the future business of advice – and how that advice can become more responsive to the demands of longevity and to changing client attitudes about advisory value. There is no fee to join. Not only will you have the opportunity to contribute to critical MIT AgeLab research through periodic, confidential surveys, but you will also receive special access to webinars and top line results that arise from the panel, providing insights into the evolving business of advice in the longevity economy, including:

- Emerging best practices addressing the changing nature of retirement;
- Advisory trends in the uses of technology, office design, client engagement strategies across generations & gender, etc.;
- Client attitudes & expectations for advice in finance as well as meaningful comparisons from other industries, e.g., health, law

Click here to learn more and join PLAN.

On behalf of our team and our partners at the MIT AgeLab, we thank you in advance for your support and your work helping clients achieve a better life tomorrow.