

# AI Annuity Assistant: The Financial Advisor's New Best Friend

News-Press Release

Plymouth, Massachusetts (Newsbox) 22-Dec-2023

<https://prsafe.com/release/16181/>

## Summary

Wealth2K's launch of AI Annuity Assistant helps with a combination of proprietary educational concepts, high-end video content and AI avatars or "digital humans" who serve as the financial advisor's sales assistants.

## Message

Boston, MA, December 22, 2023 -- What's more difficult? Explaining annuities to a prospect in understandable terms? Or being that prospect and understanding what the financial advisor is explaining? Wealth2K's launch of AI Annuity Assistant solves both scenarios using a combination of proprietary educational concepts, high-end video content and AI avatars or "digital humans" who serve as the financial advisor's sales assistants. These components synergistically combine to deliver a user experience that consumers have never before encountered. "Annuities are difficult for many financial advisors to explain to consumers. Consequently, many people don't take advantage of the unique benefits annuities provide," said David Macchia, founder of Wealth2K and developer of AI Annuity Assistant. "An annuity is the one and only vehicle that will provide a lifetime guaranteed income. But in spite of this paramount advantage, fewer people purchase annuities than should. AI Annuity Assistant revolutionizes the annuity education process, framing the annuity in novel ways. This is the key to wider acceptance of annuities and demand creation. How does it work? It starts with Wealth2K customizing a website that Wealth2k terms the Learning Center that is branded to the individual financial advisor. Customized AI Avatars are added throughout the website. In part, their role is to add a high degree of novelty to the UX. They also explain key issues of interest to retirees. Their appearance is humanlike, and their voices absolutely natural. The impact is jaw-dropping. "Prospects who visit the financial advisor's AI Annuity Assistant Learning Center are in for an engaging and informative experience, nothing like any other place to learn about annuities," said Macchia. "The beauty of these avatars is that they are incredibly realistic. You feel like you are speaking to an actual person. The only difference being the avatars have an infinite amount of patience, don't get tired and are available 24/7," said Macchia. "That doesn't mean they replace financial advisors. Their role is strictly to strengthen the human advisor, extend the advisor's reach, and deliver maximum convenience to the annuity prospect." Macchia believes that AI Annuity Assistant will be incredibly valuable to financial advisors who seek to work with Baby Boomer women. "What we've seen in the financial advisory industry are wives outliving the husbands. Yet in many cases, it's the husband who has the relationship with the financial planner. One study noted that in those cases, seven out of 10 spouses changed financial advisors within one year after their husband's passing," said Macchia. "The AI Annuity Assistant presents those Baby Boomers with a non-threatening way to learn about retirement income planning. The Learning Center better prepares them to work with the financial advisor."

For a development fee of less than \$1,000, financial advisors, life insurance professionals and other retirement income professionals can acquire the customized AI Annuity Assistant Learning Center. From there on, the cost is \$109 per month. For complete information on the AI Annuity Assistant, visit <https://www.aiannuityassistant.com/>. To set up a demo, call or email David Macchia at [dm@wealth2k.com](mailto:dm@wealth2k.com) or (781) 989-5200 ext. 201. About Wealth2K/David Macchia, RMA, CBBP:

Wealth2K Founder David Macchia is an entrepreneur, author, thought leader, public speaker and marketing content expert focused on developing communications and technology solutions for retirement income distribution planning. In 2004, he founded Wealth2K, the nation's leading provider of advisor-centric income planning solutions. He is the creative force behind the popular, Income for Life Model<sup>®</sup>, as well as Women & Income<sup>®</sup>, the first retirement income solution developed expressly for "boomer" women. His latest creation, AI Annuity Assistant is available for financial advisors, life insurance professionals and others in the retirement investment profession at <https://www.aiannuityassistant.com/>.

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