

Strive to know clients on a deeper level



Research from AIG Life & Retirement and the MIT AgeLab reveals that across all age groups surveyed, the top two drivers of client satisfaction are:

- “Understanding of my financial and life goals”
- “Expertise”

The third top driver is:

- “Ability to explain things” for clients age 30-60
- “Reputation” for clients ages 61-75

One way to help better understand clients’ financial and life goals is to **broaden conversations to include non-financial topics** that may be of importance to clients today.

Discover how this valuable new research from MIT AgeLab and AIG Life & Retirement can help you build deeper connections with clients.

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Key drivers of client satisfaction

Rank	Ages 30-45	Ages 46-60	Ages 61-75
#1	Expertise	Understands my financial and life goals	Understands my financial and life goals
#2	Understands my financial and life goals	Expertise	Expertise
#3	Ability to explain things	Ability to explain things	Reputation of financial professional
#4	Reputation of financial professional	Years of experience	Ability to explain things
#5	Years of experience	Develops my portfolio in line with my ethics/morals	Reputation of company

Today, clients are looking to you to help them see and build a brighter tomorrow, and manage the risks that may lie ahead.
AIG Life & Retirement is proud to partner with you in that endeavor.

Research Methodology: The MIT AgeLab conducted a national survey of 2,038 participants between Friday, March 6 and Thursday, March 26, 2020. The survey asked participants when, where and how they interacted with financial professionals and what topics they felt most comfortable and interested in discussing. Participants ranged in age from 30 to 75 and reported a yearly household income of \$50,000 or more and total savings of \$50,000 or more, including savings accounts, checking accounts and investment or retirement accounts. All participants reported regularly working with a financial professional.

Sample Characteristics: Survey respondents were distributed relatively evenly across ages (33% 30-45, 34% 46-60, 34% 61-75) and gender (50% female, 50% male). Additionally, the majority of the sample reported working full-time (58%), while the next largest employment group reported being retired (26%). Other, smaller employment categories included working part-time, being self-employed, being unemployed, and being a student.

AIG Life & Retirement consists of four operating segments: Individual Retirement, Group Retirement, Life Insurance and Institutional Markets. It includes the following major U.S. life insurance companies: American General Life Insurance Company; The Variable Annuity Life Insurance Company; and The United States Life Insurance Company in the City of New York. American International Group, Inc. (AIG) is a leading global insurance organization. AIG member companies provide a wide range of property casualty insurance, life insurance, retirement solutions, and other financial services to customers in more than 80 countries and jurisdictions. These diverse offerings include products and services that help businesses and individuals protect their assets, manage risks and provide for retirement security.

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