Alliant Insurance Services

Alliant RETIREMENT CONSULTING

Quarterly Insights

SECOND QUARTER 2024

April is Financial Literacy Month – Celebrate all month long with inspiring messages, helpful tools and planning resources for your employees. Please contact me if you'd like ideas and resources to build out your month-long Financial Literacy Campaign.

Participants' Perspective – What Do Participants Want?

Is Financial Wellness the "must have" new employee benefit? Research tells us there are many well-proven paths to financial security but the access to those paths is not equal.

- Among the top requests for participants according to 2023 survey results: Mega-Backdoor-Roth accounts
- Personalization, including 1 to 1 retirement planning and ongoing financial support is becoming widely available. Check out the Retirement Planning Center – powered by Alliant Financial Solutions for more ways to offer 1:1 employee support. Read more about trends in employee financial wellness here.

Participant Resources

April is Financial Literacy Month – Celebrate American Saves Week April 8-12 with this quick guide to financial lingo. Share with your employees as a way to promote financial literacy.

Most employees spend more time planning how to spend their PTO than planning how to spend their income. This helpful planning guide gives employees a month-to-month topic to help them achieve financial security all year long.

Join us on April 25th for our monthly "Financially Speaking" series – YTD Market Updated hosted by Jonathan Taporco, CIO of Alliant Retirement Consulting. If you need a copy of the invite, please reach out. Register here.

What Else Is New?

Other notable stories this month take us on the road to Vegas and take us back to 2020. Enjoy these conversation starters to use at your next get-together

- In Las Vegas the famous Bellagio fountains paused their performance for an important flock of visitors: The Yellow Billed Loon – who are considered one of the 10 rarest birds in the US. Performances continued after the loons were safely relocated.
- This month marks four years since the WHO declared Covid-19 a pandemic. Here are key stats to consider:
- The number of days Americans spend working from home has jumped 5X
- Domestic air travel has been above pre-pandemic levels since this time 2023
- Live Nation had its best year in history in 2023, selling 620M tickets coming off of pent-up demand
- Zoom shares are down nearly 40% since March 11th, 2020
- In Q1 2020 the median US home sold for $329K; in Q4 2023 it had jumped 27% to $417K

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