

NEWS

For Immediate Release



Media Contact:

Jonny Swift

Impact Communications, Inc.

+1 (913) 649-5009

JonnySwift@ImpactCommunications.org

Timelineapp Launches Digital Academy Training Platform and Announces New Resources For Financial Advisors

*New tools focus on helping financial planners coach clients
through volatile markets*

London, May 1, 2020 – [Timelineapp Tech Limited](#) (Timeline), a fintech company that provides financial advisors with next-generation retirement income software, recently launched the [Timeline Digital Academy](#), which will deliver a simple, elegant and complete training process to educate advisors in the next generation of retirement planning.

“We have built a platform that is unique to the retirement journey experience. No other provider applies data and science in equal measures to underpin the accuracy and rigour to the retirement experience,” said Timeline CEO Abraham Okusanya. “We’re always pushing the boundaries, releasing new cycles every 6-weeks to ensure we remain at the forefront of delivering personalised retirement experiences. Our Digital Academy will enable users to retain and enhance their differentiation by being proactively trained in how to apply our latest capabilities to their clients.”

Timeline users can maximize their experience on the platform by completing simple, concise and effective course modules via remote training sessions. This simple three-step training program, which includes sessions on the science behind Timeline’s unique approach, an introduction to the platform, and how to maximize and secure retirement success, was designed to achieve the following:

- Education – How Timeline utilizes science and data to solve the retirement planning process
- Empowerment – How Timeline empowers the relationship between wealth managers and their clients
- Enrichment – How Timeline delivers the very best in next-generation retirement analytics, delivering true personalization of the journey

“Training and gaining skills in new approaches and adopting new technologies are key to delivering ROI for most businesses,” said Okusanya. “We appreciate the need to educate users as much as we can in the science and approach in the core platform usability and capabilities.”

Over time, the Digital Academy will expand to be a place to share ideas and experiences with other Timeline users, to maximize knowledge of the platform, and to provide the Timeline team with insight into where users would like Timeline to go next. Timeline users can register for the Digital Academy [here](#).

NEW WHITEPAPER AND WEBINARS

In addition to launching the Digital Academy, Okusanya released a whitepaper on managing income drawdown during this bear market and also presented a two-part webinar for financial planners on coaching clients through volatile markets.

“I believe financial advisors were put on this earth for times like these, and we're here to help. We built Timeline specifically to account for markets conditions like these,” said Okusanya. “As part of our efforts to support advisors, we've put together these resources to apply the weight of historical evidence in a calm, compassionate, and convincing way to help advisors show their clients that they're going to be okay.”

Coming off the heels of one of the longest bull markets in history, the current bear market is the first real test for many clients in drawdowns. In Part 1 of the webinar [“Coaching Clients Through This Bear Market”](#), Timeline demonstrated:

- How advisors can use powerful visualization of historical events to put this situation into context for clients
- Why bear markets are a feature, not a bug
- How to account for market declines in client financial plans

In Part 2 of the webinar, [“Managing Income Drawdown In a Bear Market”](#), Timeline explored:

- How to determine if your client decumulation strategies are fit for purpose
- How the Sustainable Withdrawal framework is faring so far
- If Cash Buffer and Bucketing strategies will save the day
- If it's time to cut portfolio withdrawals
- Practical steps to keep income drawdown on track in a bear market

As a follow-up to the webinar presentations, Okusanya released an educational whitepaper titled [“Fixing the Leaky Roof for Income Drawdown Clients”](#). According to the whitepaper, the current market downturn has, yet again, exposed the logical fallacy of using straight-line projections for decumulation. A bear market is generally not a good time for making significant changes to your portfolio. However, it's a great time to review client withdrawal strategies and consider adjustments that might be required. In this whitepaper, Okusanya provides a three-point plan on what advisors with clients in drawdown should be doing now, including undertaking a robust reassessment of the withdrawal strategy, automating ongoing drawdown process as market conditions change, and coaching clients through the downturn.

Financial advisors with income drawdown clients and interested others can download a copy of the whitepaper [here](#) and watch replays of the webinars [here](#) and [here](#).

ABOUT TIMELINE

Timelineapp Tech Limited is the next-gen retirement income software used by financial planners to illustrate, create and manage sustainable withdrawal strategy for their clients. It is used by financial professionals in the UK, US and other developed countries across the world. Timeline's extensive empirical asset class and longevity data help financial advisors bring a client's retirement journey to life and answer their big retirement income questions through unique personalization and engagement capabilities. Learn more at www.timelineapp.co. Follow Timeline on Twitter [@Timeline_Tech](https://twitter.com/Timeline_Tech).

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