NEWS
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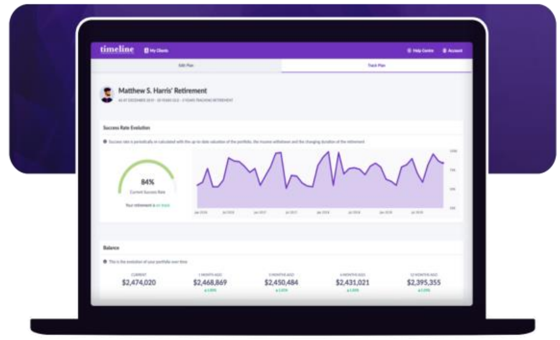

Timeline's Retirement Income Software Announces Livetrack at T3 2020 Advisor Conference

CEO Abraham Okusanya shares new features of the Timeline platform during mainstage presentation

San Diego, CA, February 17, 2020 (PR NEWSWIRE) – Timelineapp Tech Limited (Timeline), a fintech company that provides advisors with next-generation retirement income software, today announced Livetrack – your Co-pilot for retirement journeys – at the 2020 T3 Technology Tools for Today Advisor Conference in San Diego. Livetrack is the first in a series of game-changing features that Timeline will announce this year that will completely transform the relationship between the end client and his/her financial planner.

Livetrack helps financial planners and their clients visualize how a retirement journey might evolve over time. By tracking real-time portfolio balance, as well as withdrawal and asset allocation, it provides ongoing monitoring and actionable alerts to the professional financial planner who in turn will help the end client make sound decisions as life and financial dynamics occur. Livetrack changes the game in how client and planner interact, empowering both parties equally.

“We’re hugely excited about the release of Livetrack. It is a game-changer in how clients and planners interact,” said Abraham Okusanya, CEO of Timeline. “The ability to monitor the retirement journey in real-time takes the industry into a new frontier. We have an exciting roadmap at Timeline for 2020 and Livetrack is just the beginning.”

KEEPING THE CLIENT RETIREMENT JOURNEY ON TRACK

Livetrack helps keep the client’s retirement journey on track in three simple steps:

1. Ongoing assessment of sustainable withdrawal, suitability and success rate

2. Automated portfolio tracking against the client's stated goals
3. Actionable alerts to planners and senior managers within the business

LEARN MORE ABOUT TIMELINE AT THE T3 CONFERENCE

T3 Conference attendees will find Okusanya and Timeline in the main exhibit hall – **booth 313/315** – during all standard operating hours. Click here for an interactive exhibit hall map.

Okusanya will give a **press briefing** in the T3 Press Room (Rancho Santa Fe I) on Tuesday, February 18th, 2020 at 11:00 am PST. Members of the media are invited to spend time dialoging with Okusanya in a quiet setting and to pick his brain regarding best practices for financial advisors interested in helping their clients enjoy financially stable retirement years.

Okusanya will also discuss Livetrack and other new features of the Timeline platform during his **mainstage presentation** – "Retirement Distribution Needs a New UX" – at the T3 Advisor Conference in San Diego on Monday, February 17th, 2020 at 3:45 pm PST.

During his presentation at T3, Okusanya will discuss how to improve clients' understanding and create deeper client engagement through visualization of retirement strategies, as well as how account aggregation, automated tracking, and ongoing monitoring help advisors demonstrate value and improve regulatory compliance and client outcomes.

"The research into sustainability of retirement income goes back over 25 years, when Bill Bengen came up with the so called '4% rule' – which has now become one of the most popular concepts in retirement planning," Okusanya says. "Strangely, until very recently no financial planning software has enabled advisors to apply the extensive body of retirement income research to the planning process."

"Thanks to technology, we can now transform extensive, empirical data on asset class, inflation and longevity into a visually dynamic, easy-to-understand story for clients. This technology enables financial advisors to illustrate and personalize withdrawal rate strategies to a client's unique circumstances. Advisors are able to model and visualize the impact of a wider range of asset classes, taxes, fees and time horizons," Okusanya adds.

"This next wave of tech will optimize, automate and track retirement income strategies against the client's objectives and provide actionable alerts at different turns along the retirement journey," Okusanya concludes.

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.

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