

# 24 POWERFUL STATISTICS FOR FINANCIAL PROFESSIONALS WHO SERVE SPECIAL NEEDS FAMILIES (OR WANT TO)

In a study conducted by Greenwald & Associates

for The American College of Financial Services' MassMutual Center for Special Needs, four distinct areas of opportunity were uncovered for advisors to expand their book of business by meeting the needs of a chronically underserved market: special needs caregivers and their families. Below are key findings and opportunities from the study.

## RETIREMENT



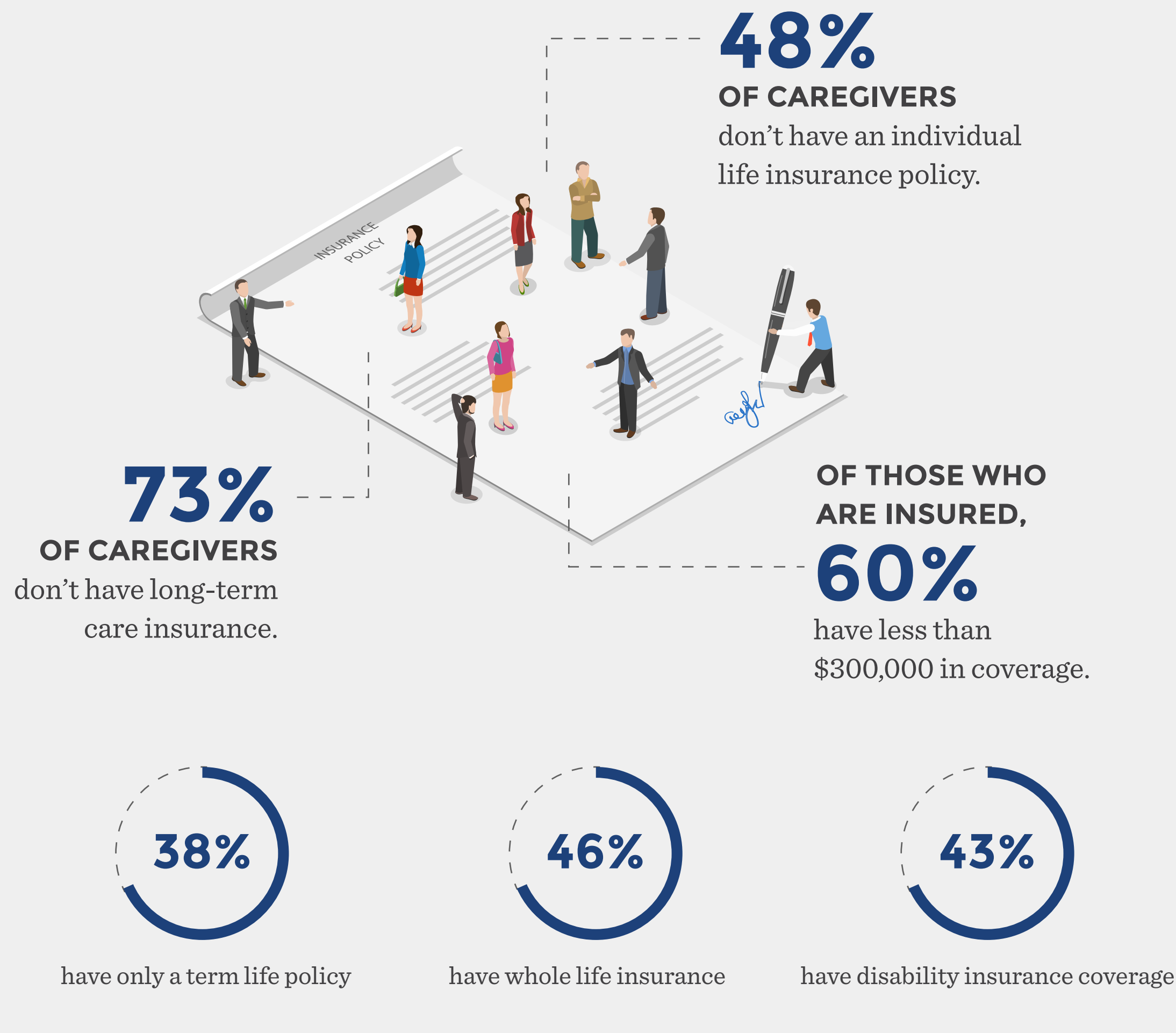
**77%** OF CAREGIVERS are concerned they won't be able to retire.

**70%** are concerned they'll have to compromise their own retirement to care for a loved one with special needs.

**2/3** of caregivers say they're **UNABLE TO FOCUS ON RETIREMENT PLANNING** because of the care they provide.

**1/3** of caregivers aren't saving for their future needs or goals - despite **14% EARNING MORE THAN \$100K PER YEAR.**

## INSURANCE

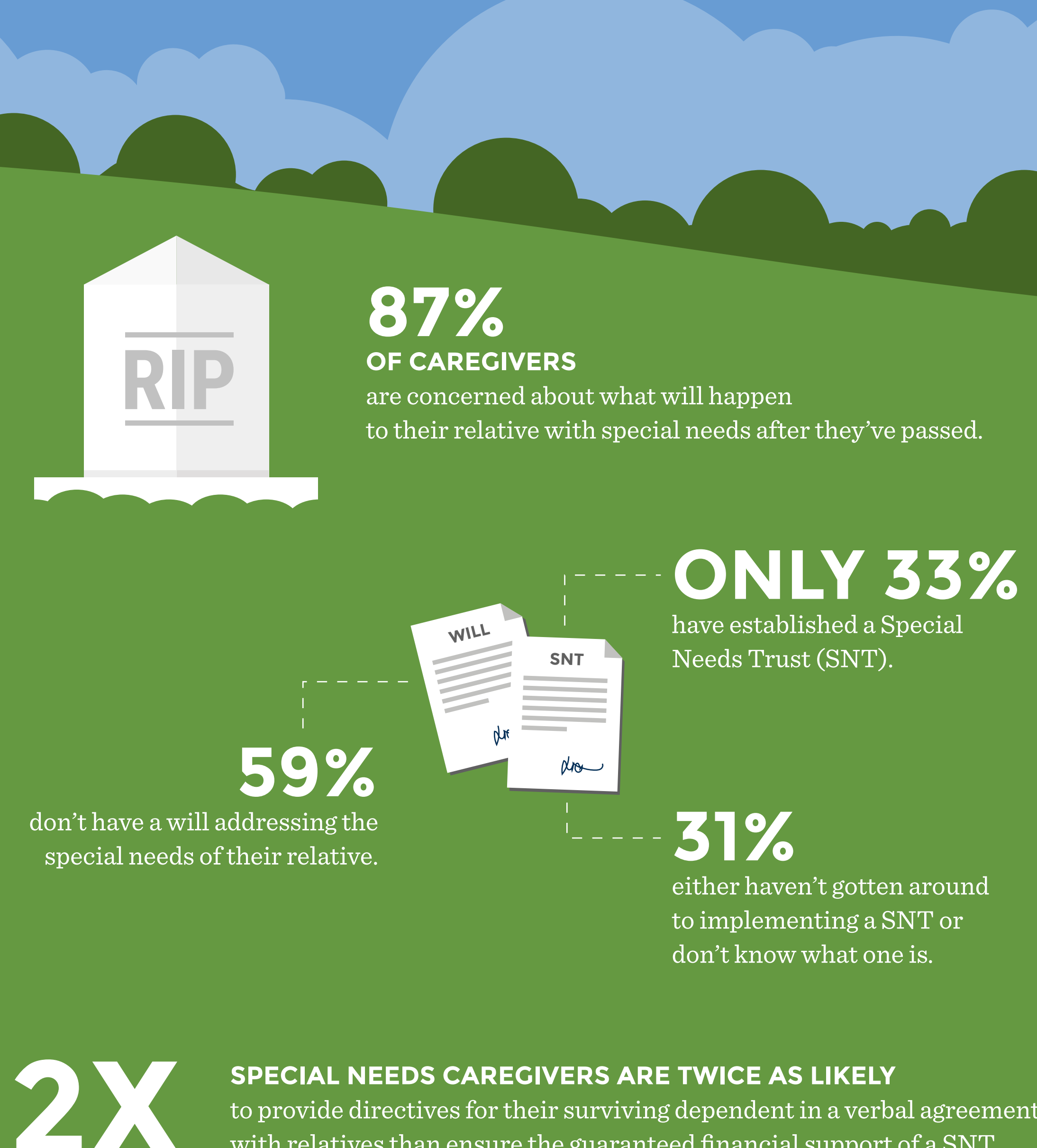


**PURCHASES OF INDIVIDUAL INSURANCE POLICIES INCREASE** in correlation with higher income levels.

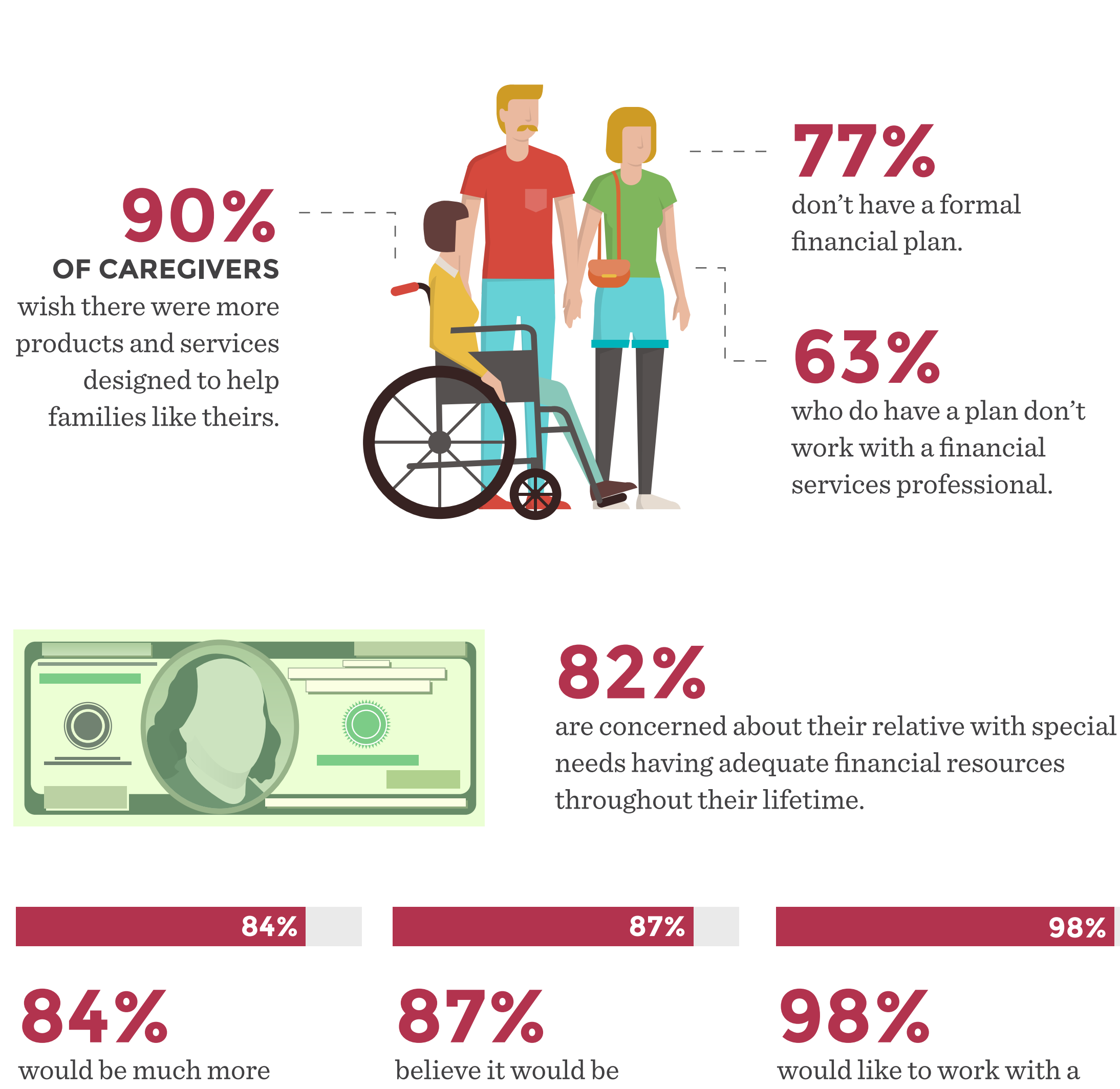
## OVER 80% OF CAREGIVERS

are interested in insurance and financial products specifically designed for special needs households.

## ESTATE PLANNING



## GENERAL FINANCIAL PLANNING



Special needs families have spoken and their needs are crystal clear. It's up to financial services professionals like you to answer their calls for help and serve them with kindness, compassion, and expertise. Are you ready?