

T.Rowe Price

T. ROWE PRICE UNVEILS INNOVATIVE RETIREMENT INCOME TOOL FOR ADVISORS

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"Income Solver" can help extend a client's income in retirement an additional seven years or \$1 million after taxes, research says

BALTIMORE, Jan. 14, 2026 /PRNewswire/ -- T. Rowe Price (NASDAQ-GS: TROW), a global asset management firm and a leader in retirement, has launched [Income Solver](#)® through its fintech subsidiary Retiree Inc., a software tool that helps financial advisors differentiate their practice by elevating retirement planning with advanced, multi-dimensional withdrawal strategies. The software helps financial advisors develop personalized withdrawal strategies for their clients, which coordinate their clients' withdrawals from investment assets, Social Security, Medicare premiums, and other income sources while seeking to minimize the impact of complex tax rules. These outcomes are rooted in a proprietary methodology that our research indicates can help extend a client's retirement income up to an additional seven years or \$1 million after taxes.



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"A 'set it and forget it' approach does not work once someone is in the decumulation phase of life and needs income to live on," said Bill Meyer, Head of Retiree Inc. "Income Solver is different from other financial planning software by dynamically analyzing and implementing the withdrawal sequence every year, which has the potential to add significant portfolio longevity."

Income Solver enables advisors to:

- Provide clients with the details they need to generate income in retirement
- Save time and reduce manual errors by letting Income Solver test thousands of withdrawal strategies and deliver a curated list to review
- Present advanced planning techniques, such as Roth conversions and household level rebalancing, for greater tax efficiency
- Manage fluctuating retirement cashflows, while navigating complex tax rules affecting required minimum distributions, Social Security, and Medicare premiums
- Optimize Social Security claiming with the embedded [SSAnalyzer](#)® tool
- Streamline the planning process and spend more time engaging with clients regularly through planning check-ins

The addition of Retiree, Inc.'s Income Solver builds on T. Rowe Price's robust suite of retirement income solutions for advisors and is supported by ["Solving the Retirement Income Puzzle,"](#) an educational program that provides advisors with content they can use to teach and assist pre-retirees in navigating the complexities of retirement income planning.

"At T. Rowe Price, we are committed to staying at the forefront of retirement innovation and delivering a broad range of solutions to help advisors differentiate their value and grow their client relationships," stated Kevin Collins, Head of U.S. Intermediaries at T. Rowe Price. "Income Solver enables advisors to ask their clients, 'What would you do with seven more years of money in retirement?' This is a powerful question to help people imagine the possibilities of their retirement."

ABOUT T. ROWE PRICE

T. Rowe Price (NASDAQ-GS: TROW) is a leading global asset management firm, entrusted with managing \$1.78 trillion in client assets as of December 31, 2025, about two-thirds of which are retirement-related. Renowned for over 85 years of investment excellence, retirement leadership, and independent proprietary research, the firm leverages its longstanding expertise to ask better questions that can drive better investment decisions. Built on a culture of integrity and prioritizing client interests, T. Rowe Price empowers millions of investors worldwide to thrive amidst evolving markets. Visit [troweprice.com/newsroom](https://www.troweprice.com/newsroom) for news and public policy commentary.

Retiree Inc., a wholly owned subsidiary of T. Rowe Price, is an information technology company that develops retirement income planning and withdrawal strategy software and Social Security analysis software for financial professionals and financial services companies.

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