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## **Voya Financial Advisors' Thomas A. Kalejta Expands Advisory Services with Advanced Planning Program**

Thomas A. Kalejta of Kalejta Financial Management, an Investment Advisor Representative with Voya Financial Advisors, Inc., has expanded his practice by building a focus on financial planning services. Thomas A. Kalejta enlisted the support of the Voya Advanced Planning program – a dedicated, credentialed services team equipped with targeted resources and best-in-class technology platforms, to drive that focus. To evolve its network, Voya Financial Advisors has launched new resources, technology enhancements and an expanded product shelf, helping to grow annual advisory sales by 30 percent during 2015.

"I know how important the holistic financial planning experience is to my clients," commented Kalejta. "Tapping into the Voya Advanced Planning program has allowed my business to elevate its focus on client experience and put financial planning at the center of all that we do."

According to research from Voya Financial, Inc.<sup>1</sup>, individuals who work with a financial professional take more steps to plan for retirement. For example, more than four times (37 percent) as many have a formal written retirement plan, compared to those (8 percent) who do not work with a professional. Financial planning provides an opportunity to work with clients to build a well-rounded strategy. The new Advanced Planning program fulfills a growing need in the market by supporting those advisors who want to offer financial planning services to their clients.

"Voya Financial Advisors wants to help advisors expand the way they support their clients. This includes deepening those relationships and staying focused on financial planning and retirement readiness," said Tom Halloran, president, Voya Financial Advisors. "Our new Advanced Planning program is an example of the investments we are making and the value we deliver to advisors who are evolving and growing their practices. These efforts underscore our position as a leading broker-dealer and the vision we have to be America's Retirement Company™."

Voya's Advanced Planning program leverages a suite of expanded resources and integrated technology capabilities. An industry-leading software platform delivers a seamless experience to help advisors provide better plan implementation and adoption. The program provides a structured process for advisors and clients to follow as they create a plan with a clear focus on defining and quantifying the value of the advisor's role throughout the experience. Plans are completed with the support of digital resources and reviewed regularly to make adjustments based on life changes and market events.

The new relationship-oriented approach is helping advisors establish stronger connections with their clients. "Since adopting Voya's Advanced Planning program into my practice I have been able to implement a defined process, with specific client expectations for financial planning. This has enabled me to have more productive meetings, fewer ad-hoc requests and focused time to serve and grow my customer base," said Kalejta.

# NEWS RELEASE

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Voya Financial believes that regardless of one's age or life stage, investing the time today to get organized and create a plan can help individuals prepare for a more secure financial future.

1. Voya Financial *Retirement Research Institute* 2015 study: "The benefits of working with a financial professional."

**Kalejta Financial Management** is not a subsidiary of nor controlled by Voya Financial Advisors, Inc.

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**About Voya Financial Advisors**

Voya Financial Advisors, Inc., the retail broker-dealer of Voya Financial® (NYSE: VOYA), supports a wide range of clients through approximately 2,100 financial advisors. As a top-tier independent broker-dealer, Voya Financial Advisors is focused on helping Americans advance their retirement readiness through education, financial planning and a broad range of personalized asset accumulation, protection and distribution solutions. Voya Financial is a premier retirement, investment and insurance company with a vision to be America's Retirement Company™ serving the financial needs of approximately 13 million individual and institutional customers in the United States. For more information, visit <http://voya.com>.

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