



DEFINING THE FUTURE OF RETIREMENT

The Retirement Income Industry Association Organizes Unique Research Panel for Upcoming Annual Meeting

~ Prestigious Researchers Share Cutting Edge Findings with a View Across the Silos ~

Boston, MA (September 24, 2009) The Retirement Income Industry Association (RIIA) has organized a unique panel of research experts from across the financial services industry who will share the latest findings from cutting edge research projects at the upcoming RIIA Annual Meeting, announced Francois Gadenne, Chairman and Executive Director of RIIA.

"A key benefit of RIIA membership is to gain access to this caliber of experts from across the industry," said Elvin Turner, Co-Chair of RIIA's Research Committee and key organizer of the panel. The current participating panelists include:

Merl Baker, Brightworks Partners, (www.brightworkspartners.com), a premier quantitative researcher. He is the former president of Louis Harris and Associates USA, and spent time at such leading research firms as Monitor Group, Yankelovich Partners and Spectrem Group/PSI Global. He currently practices in the defined contribution space, focusing on plan sponsors, advisors and TPAs.

Larry Cohen, SRI Consulting Business Intelligence, (www.sric-bi.com/cfd), the voice of RIIA research. His firm produces the MacroMonitor, a market research program that has tracked and measured consumers' complete financial services behaviors and attitudes continuously since 1978. RIIA has continued to mine gems from this program with the publication of the fourth RIIA report, *Financial Advisors and Boomers: Regular Use May Be Beneficial to Your Wealth*, that draws from this research.

Luis Fleites, Financial Research Corporation, (www.frcnet.com), the writer of many of the 100+ page research reports that have made FRC a major name in the retirement research market. His research, writing and consulting keeps him in touch with the financial services companies that drive the retirement marketplace.

Matt Greenwald, Mathew Greenwald & Associates, (www.greenwaldresearch.com), a pillar in the financial service research community. He is a recognized expert on opinion research with more than 30 years of market research experience. After serving as the Director of Social Research at the American Council of Life Insurers, he founded the firm that sponsored such programs as the Retirement Confidence Survey, which he conducts in partnership with EBRI.

PRESS RELEASE

Anna Rappaport, F.S.A., M.A.A.A., Anna Rappaport Consulting (www.annarappaport.com) an actuary and expert regarding the risks that can, or should, keep retirees up at night. She is past president of the Society of Actuaries and is currently chairperson of the SOA's Committee on Post-Retirement Needs and Risks. She is passionate about finding ways to make retirees' lives better and helping the advisors who help them.

"This diverse research group has varied backgrounds, offers a wide range of products and services, and provides valuable, useful insights into the retirement income industry that RIIA members can bring back to their organizations," according to Turner.

The panel will offer a roundtable discussion on several probing questions facing the industry. The second part of the program will be an open forum where the panelists take any and all questions from the audience at the Annual Meeting. "Each panelist will bring findings from their most recent research projects that help confront the challenges and leverage the opportunities within the retirement income industry today," he explained.

To be held on October 5-6, 2009 at the Boston Hyatt Harborside, the RIIA Annual Meeting is a unique venue offering a "View Across the Silos" of the retirement income and financial services industry to members and non-members alike. Register online at (<http://riia-usa.org/conferences/default.asp>), contact Deborah Burkholder at 617.342.7390, or email staff@riia-usa.org for more information.

About the Retirement Income Industry Association (www.riia-usa.org)

RIIA's mission as a national not-for-profit organization is to bring the retirement income industry together with a "View Across Silos" to develop the products, processes and advisory services Americans need to create a secure retirement. Because RIIA members span the entire industry, they create a forum for sharing the freshest outlooks, the most modern thinking, the latest research and the newest product development within the realm of retirement income. This unique view provides investors and advisors with unbiased perspectives on key retirement income issues.

Media Contact: Susan Chanley, sbumsteadchanley@comcast.net, 781-587-0115

PRESS RELEASE