



## DEFINING THE FUTURE OF RETIREMENT

### The Retirement Income Industry Association's Spring Conference Features "Architects" of the New Retirement Income Reality

Boston, MA (February 2, 2010) Success in the new retirement income reality will rely on the same fundamentals used by architects to build modern structures that last for generations, contends Francois Gadenne, Chairman and Executive Director of the [Retirement Income Industry Association](#) (RIIA). "These essential building blocks integrate product, processes, technology, and communications combined with a heavy dose of ingenuity to construct solutions needed to help millions of Americans create secure retirement."

The [RIIA 2010 Spring Conference](#) will bring together innovators and "architects" to highlight what's new and energizing across the retirement income industry today and into the future from March 22 – March 23, 2010, at the Ibbotson Morningstar Offices, 22 West Washington St in Chicago, IL. [Registration is simple online.](#)

Forward thinking presentations will be delivered by leading companies and experts including Financial Research Corp., Boston University, Fidelity Investments, Ibbotson, SunTrust, PIMCO, Wachovia, New York Life, Envestnet, Life Yield, Impact Technologies, Wealth2k, HealthView and Russell Investments.

Moshe Milevsky, Executive Director of The IFID Centre, Associate Professor of Finance at York University, and prolific author on financial risk management and personal wealth management topics, will participate as a guest speaker focusing on "Retirement Spending Rates: Can We Reconcile Financial Economics with Financial Planning?"

Other dynamic discussions will include:

- New directions from leading research firms on future products.
- What is the "right" tool for estimating retirement income? Is there a "best" tool? featuring Professor Larry Kotlikoff of Boston University.
- Financial Advisor Panel: Integrating the latest industry innovations – what's working? with Jim Otter, Retirement Optimizer, and David Giegerich, Paradigm Wealth Management.

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RIIA also offers thanks to 2010 Platinum Sponsor, Ibbotson Associates, for the generous donation of the meeting facilities for the Spring Conference and is pleased to welcome DTCC (Depository Trust & Clearing Corp) as Silver Sponsor and Keynote Speaker. Additional [sponsorship opportunities](#) are still available by contacting Deborah Burkholder, [Deborah@riia-usa.org](mailto:Deborah@riia-usa.org).

### **Added Dimension—New Retirement Management Analyst™ Designation**

Capitalizing on the need for advisors in the future to provide more inclusive, integrated, and complete retirement income solutions for their clients, RIIA has developed the first comprehensive retirement management designation for financial advisors: [Retirement Management Analyst™ \(RMA\)](#). A pilot review session and examination will take place following the conference, on March 24th. For more information about the RMA, please contact Stephen Mitchell, COO of RIIA, at [sm@riia-usa.org](mailto:sm@riia-usa.org).

### **About the Retirement Income Industry Association ([www.riia-usa.org](http://www.riia-usa.org))**

Founded in 2006 by leading companies, advisors and academics, RIIA and its members address the challenges facing the dramatically changing retirement income landscape. 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.

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