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RIIA Members Lead the Way

RIIA is stepping up its growth and expansion with even more offerings and benefits to members. In fact, RIIA members lead the way in delivering cutting edge research, education, conferences and networking opportunities. To remain at the forefront of the dynamic world of retirement income, we ask that you renew your membership and your commitment today.

Membership

It's growing steadily and our members represent the "Who's Who in the Industry". RIIA is looking to increase membership more rapidly and is actively seeking new members to bring their talents and knowledge to the table. Most recently, RIIA formed two new committees, the Noted Authors Committee and the Compliance Standards Committee. The Compliance Standards is led by Joan Boros with the goal of finding ways use compliance as a competitive advantage, instead of focusing on it as burden.

Programs

The mission of the Program Committee, led by Paul Fichera, is to develop & sponsor events that engage Financial Services professionals around emerging trends and critical topics in the retirement income industry. The 4th Annual Managing Retirement Income Conference, Feb. 11-13, 2008, at The Doral Country Club and Resort, Miami, FL brought together top retirement income industry executives, financial advisors, leading academics, innovators and researchers.

Education

RIIA's Education Committee plans significant expansion to build upon the master-classes which were developed in 2006 and 2007. The Committee will continue to create a retirement income body of knowledge, a curriculum with 4 levels for the Retirement Income Expert designation, and a growing number of specific learning objectives which incorporate "cross silos" expertise. These resources include experts from RIIA membership as well as academics associated with various U.S. and overseas universities.

Research

RIIA's first research study: "RIIA's Retirement Typology" was done in collaboration with Elvin Turner of Turner Consulting LLC and Larry Cohen of SRI Consulting Business Intelligence. The research identifies 16 distinct household segments and maps their behaviors and financial holdings to the products and services of the firms who serve them. The publication of RIIA's next study for institutions and advisors, "The Coming Consolidation: Making the Short List," answers fundamental questions about the relationships between financial institutions, their customers, and the future role of financial advisors. The study will be available this spring. *RIIA members receive access to all studies as well as expanded reports for a very attractive discount.*

Communications

David Macchia, the chair of the Communications Committee, is leading the effort to increase RIIA's visibility and the important work the members are doing to create the future of retirement income. This Committee also created the RIIA Awards Program in 2007 to recognize independent, cross-silo benchmarking of distinction in retirement communications. The winners showed recognizable leadership and innovation, serving as examples for other organizations to model as they dedicate increasing resources to communications, advertising and promotional strategies.

Methodologies

The Methodologies Committee released a Statement of Principles in 2007 with the purpose of establishing "best practice" standards for income projection models. The Statement of Principles has received strong interest from the media and the industry, and the Committee will bring this effort to another level in 2008 by developing guidelines for adhering to the principles.

Full-Time Executive Director Leadership

Just recently, the Board of Directors unanimously voted that Founding Chairman, Francois Gadenne, assume full-time leadership of RIIA as its Executive Director. Francois divest his commercial interests in his company, Retirement Engineering, Inc., including all intellectual property assets to allow him to focus exclusively on RIIA's expansion. Several members have already approached Francois about supporting new research into what they view as the necessary development of an empirical validation framework for best practices in the retirement income industry.

In just a few short years, RIIA has distinguished itself as the premier, not-for-profit forum for sharing information, strategies, research and solutions that define the future of retirement security in America. Our committee structure and new full-time executive director encourage members to become involved by sharing their talents, expertise and leadership. RIIA needs your commitment and your participation to continue this great momentum and seize new and exciting opportunities.

Thank you!



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