

Retirement Management Analyst® (RMA®) Summary Syllabus

Michael Kitces described the RMA designation as one of the “...rigorous designations that include both education and an advice process...” providing “...a likely path of safety for Financial Institutions” to meet their fiduciary duty. (Read Michael’s full article [here](#).) This summary of the RMA class syllabus provides an overview of the coursework and time commitment to become a Retirement Management Analyst. Cost information can be found [here](#). [Register here](#).

RIIA® promotes the Retirement Management Analyst designation to members, employees of member and non-member companies that have placed the RMA on their approved list, and the financial industry, in general.

The course takes a total of nine calendar weeks. Following an initial orientation week, there are seven weekly modules with an eighth week for review. Each week is anchored by online content to read and augmented with on-demand video and audio presentations. Depending on your experience with retirement income planning, you can expect to spend 10 to 20 hours per week to read material, listen to lectures and complete case studies and quizzes.

RIIA’s final RMA exam is an online set of multiple choice questions built from a bank of hundreds of questions. Its purpose is to test for a threshold level of competence across the curriculum.

What to Expect During the Class

Study for the Retirement Management Analyst designation is provided by independent, accredited institutions such as Salem State University, in co-operation with RIIA which administers the RMA designation.

Class content includes:

- Readings, presentations and recordings
- Discussion groups
- Quizzes
- A case study that progresses weekly
- Access to unique software for case studies
- Interaction with faculty and other students for questions and discussion.

Each week includes three activities counting for one third of the course grade:

- “In Reality”: A weekly topic, based on comments from practicing RMAs about the current content, for discussion among students and instructor. Students are expected to actively participate in the discussions as part of their learning experience and final grade.
- Case Study: An evolving case is presented. You’ll be asked to write plans and recommendations based on the case and concepts presented in the course.
- Quiz: A weekly quiz will cover the material in each module. Correct answers are given after you complete the quiz to aid in your continuing study.

In addition, there is a weekly live online lecture led by the instructor in which the week’s topics will be discussed and explored. This lecture is recorded and available “on demand” following the live presentation.

Taking the RMA Examination

A student that earns a grade of 75% or better for the entire online course, and has his/her [RMA Candidate Application](#) approved by RIIA to confirm qualification for the general education, experience and ethics requirements, may take the online final exam. A passing grade on the final exam is 75%.

You can complete the candidate application at any time. You can take the RMA exam at any time during the 12 months following your candidacy approval and completion of an approved course of study.