



Making Powerful Connections to Advance Retirement Security

2010 RIIA ANNUAL MEETING & AWARDS DINNER

Join us in Boston on **October 4th and 5th** for the Retirement Income Industry Association's 2010 Annual Meeting and Awards dinner and *get connected to the energy and ideas of the leading thinkers and advocates in the retirement income industry today.*

RIIA: Generating solutions, shaping change

In just a few years, RIIA has become a leading force in shaping the future of retirement income planning and a key player in creating the standards that drive retirement security.

Our emphasis on **EDUCATION** and **ACCESS** creates a **powerful combination for our members.**

Our unique view *Across the Silos* allows for the kind of dynamic interaction between advisors, scholars, researchers, and product innovators that generates new knowledge, planning ideas, and product solutions to address the evolving needs of consumers and keep our members in the forefront of change.

For Advisors: The new Retirement Management AnalystSM designation –RMA -- gives financial advisors the critical edge that they need to provide meaningful solutions for their clients through advanced knowledge, skills training, and ongoing education.

For Policy Makers & Regulators: RIIA has become the “go to” resource for Washington updates, testimony, in-person meetings, and the DOL’s Request for Information responses.

For Institutions: RIIA offers access to the latest research, trends and thought leadership from innovators, academics and the media. Plus, an option to incorporate the RMASM firm-wide.

For Consumers: RIIA’s education, research, influence, and connections give advisors, investment firms, and financial planning organizations a solid base for their efforts to drive more effective, secure retirement solutions for today’s retirees.

REGISTER TODAY

www.RIIA-USA.org

For questions or more information:

Call: 617.342.7390

Email: staff@riia-usa.org

What You Can Expect at the Annual Meeting and Awards Dinner

All attendees will get vital updates on the latest programs and resources available through first-person reports from the RIIA Committee chairs:

- the **Employment Benchmark Survey** with the newest insights on how companies are organizing and staffing for retirement income initiatives
- the popular monthly Webinar series on the current trends and issues affecting the retirement income business
- upcoming RIIA-sponsored research reports
- the latest contributions by our wide range of noted authors and thought leaders

And more...

And, the winners are....

The RIIA Annual Meeting is also a time to recognize the companies and individuals who have demonstrated breakthrough thinking in retirement income communications and research. At our Awards Dinner we'll be presenting awards for:



Annual Excellence in Communications. Sponsored by RIIA's media partners, these awards recognize the retirement income communications initiatives, programs and materials that are unique, innovative, and effective -- and have impact across the silos.



Achievement in Applied Retirement Research. Sponsored by *Research* magazine, this award is given annually to an academic researcher to recognize work in applied research that has significantly advanced the field of retirement income management and financial planning.



RIIA's **Thought Leadership Award** is designed to promote research, scholarship and innovative thinking on retirement management topics that contribute to RIIA's body of knowledge and the Retirement Management AnalystSM curriculum. The author(s) of the winning entries will be published in RIIA's new publication, **The Retirement Management Journal**.

For more information on submitting materials for award consideration, contact staff@riia-usa.org

Get energized at the 2010 RIIA AMAD

Don't miss the chance to refuel and refresh your thinking and renew your commitment to your own retirement income leadership at this information-packed meeting. You'll have an opportunity to

- Gain insights and inspiration from compelling guest speakers, including **Marsh Carter, Chairman of the New York Stock Exchange**.
- **Hear from Washington insiders** on the latest thinking and actions of policymakers who will impact the entire retirement income industry.
- Learn about **advancing the Retirement Income curriculum for your firm** through the newest, most comprehensive education program in retirement income management today: the RIIA RMASM program.
- Make new connections for **learning, networking, re-energizing**.

AGENDA

Monday, October 4, 2010

5:00	Cocktails
6:00	KEYNOTE Speaker: Andrew J. "Buddy" Donohue , Director, Division of Investment Management, US Securities and Exchange Commission
6:30	RIIA AWARDS DINNER Awards Sponsored by RIIA's Media Sponsors: InvestmentNews, PlanSponsor, InvestmentWires

**MONDAY, October 4:
RMASM Review Class
and Exam
8:00 – 4:00**

Tuesday, October 5, 2010

7:30 – 8:00	Continental Breakfast & Registration	Deborah Burkholder
8:00 – 8:30	Welcome Address and Opening Remarks	Francois Gadenne
8:30 – 9:30	RIIA Education Committee Exciting progress since the launch of the RMA SM Joining forces with Boston University and the launch of BU's Certificate Program Winning new retirement business in the field: Hear from Financial Advisors who earned the RMA SM	Bob Powell Ruth Ann Murray Chuck Robinson
9:30 – 10:00	GOLD SPONSOR: Bank of America Merrill Lynch	David Tyrie
10:00 - 10:30	NETWORKING BREAK	
10:30 – 11:00	RIIA Benchmarking Committee Companies have become innovative in their approach to supporting retirement income planning. Hear the latest trends and best practices.	Matt Greenwald, President and CEO, Mathew Greenwald & Associates
11:00 – 11:15	Research Magazine's Award for <i>Achievement in Applied Retirement Research</i>	Gil Weinreich
11:15 – 11:45	RIIA Committees Updates Hear what's behind our Membership drive; how we're enhancing communications with our members and leveraging connections between members, and building the RIIA library with celebrity Noted Authors	David Macchia, Carol Hartman Marcia Mantell, Kazi Ariff Greg Cherry
11:45 – 12:00	GOLD SPONSOR: Allianz Global Investors Introducing the RMJ and RIIA's Thought Leadership Award	Bruce Wolfe
12:00 – 1:00	Lunch w/ Keynote Speaker	Marsh Carter, Chairman NYSE
1:00 – 1:30	NETWORKING BREAK	
1:30 – 2:15	RIIA Retirement Plan and IRA Committee This new committee has been at the forefront of the legislative initiatives and policy activities. Hear all the details from our new committee chairs	Steve Saxon, Groom Law Group
2:15 – 2:30	RIIA Resources Committee This committee has made it possible for all RIIA members to hear the most current retirement research directly from the experts	Judy Zaiken
2:30 – 3:00	RIIA Research Committee With RFPs issued and new research in the works, you'll hear what's coming in time for RIIA's 5 th anniversary	Elvin Turner
3:00 – 3:30	COO's Report Expect a major announcement about a new RIIA Retirement Income Index and the partner who will help shape the model	Stephen Mitchell
3:30	MEETING ADJOURNS	

REGISTRATION & EVENT PRICING

Each RIIA Member/Company receives one free admission as part of their regular membership dues. *(Basic Individual Membership does not include the Annual Meeting and Awards Dinner, but you are invited to attend. See pricing below.)*

If you are not a member, this is an excellent time to join. *(Member Firms receive one free admission to this event as part of their membership.)*

Same Member pricing as last year!

Members Pricing

Per person:	Complimentary (1/membership)
Additional Attendee with Member Firm:	\$350 (\$299 before August 31)
Basic Individual Member:	\$350

(upgrade to Full Membership and save \$100 off the price of the Annual Meeting – and get more member benefits!)*

Non-members Pricing

Per Person:	\$995 (\$900 before August 31)
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(Financial Advisors – join as a Full Individual Member and save 50%!)

Press

by Approval (Contact staff@riia-usa.org)

Book your hotel accommodations early at the Harborside Hotel to get the discounted rate.

Details are on the RIIA website at www.riia-usa.org.

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** Cost to upgrade is \$250.00 and applies to your current year membership only, plus provides you full admission to the Annual Meeting and Awards Dinner.*

Cancellation Policy:

If we receive your request to cancel 30 days or more prior to the conference start date, your registration fee will be refunded minus a \$25 administrative fee (per paid attendee canceled). Cancellations occurring after Labor Day (September 6, 2010) will receive a 60% refund (per paid attendance canceled).