



DEFINING THE FUTURE OF RETIREMENT

The Retirement Income Industry Association (RIIA) Invites Financial Advisors and Industry Leaders to Meet and Learn from “Income Pioneers”

Elite financial advisors share their successes and insights in the retirement income planning business at upcoming RIIA Annual Meeting, September 17, 2007

Boston, MA (August 21, 2007) Creating an unprecedented opportunity for financial advisors to gain valuable insights from their peers, the Retirement Income Industry Association (RIIA) will bring together an elite group of advisors who have successfully made the transition to income generation-oriented practices in order to meet the needs of their Boomer clients. This not-to-be-missed event will take place as part of RIIA’s Annual Meeting and Awards Dinner on September 16-17, 2007 in Cambridge, MA.

Says Francois Gadenne, Founding Chair of RIIA and CEO of Retirement Engineering, Inc., “While it is generally agreed that the vast majority of financial advisors have yet to make the transition to income-generation-focused practices, it’s also true that there is a group of leading advisors who have already successfully made the transition and are enjoying unquestionable financial success.”

“The ‘income pioneers’ are financial advisors who have successfully implemented the transformation necessary to align their practices with the income-oriented needs of the Boomer generation,” explains David Macchia, Chair of the RIIA Communications Committee and chief executive of Wealth2k, Inc. “They are the elite individuals whose success and vision constitute a model for other financial advisors to emulate.”

The upcoming RIIA Annual Meeting addresses the challenges and frustrations financial advisors experience in helping their clients achieve a secure retirement during a time when yesterday’s accumulation approaches are no longer adequate and new income generation approaches and products are still in development.

“To help address these challenges, RIIA has brought together several ‘income pioneers’ in an unprecedented opportunity for financial advisors, RIIA members, and other key players in the industry to network and learn from these special individuals,” continues Macchia.

Presentations by financial advisors Phil Lubinski, CFP, Briggs Matsko, CFP, and Harold Evensky, CFP will be featured along with a book signing with Evensky, author of Retirement Income Redesigned, and Terry Burnahm, author of Mean Markets and Lizard Brains. The keynote addresses include Mathew Greenwald on inevitable grassroots change and Professor Zvi Bodie of Boston University on encouraging adaptation.

“Gaining a full understanding of how the ‘income pioneers’ view the Boomer retirement opportunity is strategically important for any financial services organization or financial advisor intent on being successful in the years to come,” says Gadenne.

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To register for the RIIA Annual Meeting and learn about how to evaluate competing approaches to income-generation and how to gauge Boomer retirement income needs in terms of products, education and services, go to www.riia-usa.org.

The event will be held on September 16 -17, 2007 at the Royal Sonesta Hotel Boston in Cambridge, MA. RIIA is also proud to recognize Pepe & Hazard,LLP as a Platinum Co-Sponsor of the event. **Members of the media are welcome to attend.**

About the Retirement Income Industry Association

RIIA (www.riia-usa.org) is a national, not-for-profit organization whose members are defining the future of retirement security in the United States. The vortex of innovation in the retirement income business, RIIA provides a non-biased forum for sharing information, strategies and research. RIIA members receive quantitative and qualitative analyses of trends in the manufacture, distribution and usage of retirement income products and services. The association facilitates understanding of retirement income issues through educational programs and training.

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