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PRESS RELEASE

The Retirement Income Industry Association Congratulates New Recipients of the Retirement Management Analyst℠ Designation

Boston, MA (June 8, 2011) The Retirement Income Industry Association (RIIA) congratulates the financial professionals who recently received the Retirement Management Analyst℠ designation, also known as the RMA℠ designation. This title represents achieving proficiency in advanced education curriculum in retirement income planning and management. This class successfully completed the Retirement Management Program at Boston University's Center for Professional Education and passed the rigorous examination.

The Spring 2011 RMA℠ certificate-holders are:

- William T. Feakes, Regional Vice President, New York Life/Mainstay Investments
- Michael Hake, Retirement Specialist, Janus Capital Group
- Devin Reid, Product Manager, First Command Financial Services
- Gwendolyn Rothrock, Financial Advisor, PNC Financial Group

According to Francois Gadenne, RIIA's Executive Director and Chairman of the Board, the collapse of the economy and financial markets in 2008 made it clear that traditional investment planning was not working and was putting millions of Americans' retirement security at risk. The RIIA leadership group saw right away that there was a compelling need for a more comprehensive approach to retirement income management which is how the RMA℠ certification came into being. The RMA℠ curriculum is not only challenging, but encompasses continuing education to address ongoing additions to the Retirement Income Body of Knowledge.

"The goal of this designation is to help financial advisors and professionals gain the specialized skills and knowledge they need to achieve the highest level of success in providing retirement income solutions to their clients and in serving their companies," explains Stephen Mitchell, RIIA's Chief Operating Office and a key leader in developing the RMA℠ program.

About the Retirement Management Analyst℠ Designation

To earn a RMA℠ designation, a financial advisor or other professional must complete a rigorous educational and ethics training curriculum, pass a RIIA Approved Education Program such as the Retirement Management Program at Boston University's Center for Professional Education as well as successfully pass the written exam. The specialized RMA℠ curriculum focuses on:

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1. **Building the Retirement Plan to Mitigate Risks:** The objective is to learn to create complete plans for retirement income that first build an income "floor" for the client and provide appropriate exposure to upside potential, based on each client's unique goals and circumstances.
2. **Mastering the Advisory Process:** Using a powerful yet easily explainable "hub and spoke" approach, the client household is at the center of the RMA℠ Advisory Process. The process starts with the household balance sheet including a review of human capital, social capital and financial capital. It moves to the household annual budget, assesses risks over the household life-cycle, calculates the portion of financial capital that should go to creating the retirement income "floor", allocates the portfolio among risk management techniques, and maps the results into matching appropriate product solutions.

For more information about the RMA℠ designation, criteria, and requirements, please visit the RIIA website, www.riia-usa.org.

About the Retirement Income Industry Association (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 stimulate the development of 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 most rigorous education, the latest research and the newest product development within the realm of retirement income.

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