

DEFINING THE FUTURE OF RETIREMENT

- Share ideas and solutions with industry leaders
- Contribute to the creation of, and benefit from, new customer communication strategies
- Obtain exclusive benchmarking data to enhance product development and distribution
- Participate in public policy discussions



APPLICATION:

My firm wishes to join RIIA as:

- Regular Member (Dues: \$10,000/annum)
- Associate Member (Dues: \$2,500/annum)
- Plan Sponsor Member (Dues: \$500/annum)
- Financial Advisor Member (Dues: \$250/annum)

Payment:

- Dues check is enclosed with application
- Please invoice Member Representative # _____

CONTACT INFORMATION:

Business Name _____

Website Address _____

Description of Business _____

EXECUTIVE REPRESENTATIVE

Name _____

Title _____

Address _____

City _____

State _____ Zip _____

Phone _____ Fax _____

Email _____

SECONDARY REPRESENTATIVE

Name _____

Title _____

Address _____

City _____

State _____ Zip _____

Phone _____ Fax _____

Email _____

MEMBERSHIP CATEGORIES:

REGULAR MEMBERS are firms which develop or distribute retirement income products or participate in the industry in such a significant manner that the Board determines it should be a regular member. Regular members may participate where appropriate on Association committees, are encouraged to identify other areas where they may contribute to RIIA's work and be considered for election to the Association's Board of Directors. Each regular member's firm is entitled to one vote on any matter put before the membership for a vote.

ASSOCIATE MEMBERS are individuals and firms that serve the industry such as law, accounting, and consulting firms. These members have no vote on RIIA business matters but are encouraged to contribute to RIIA's work through committee participation, conference administration, and provision of expert resources/research. These member firms pay a discounted membership fee and may become a regular member upon payment of regular member dues. No regular member firm offering retirement income product/services and/or distribution may be an associate member.

PLAN SPONSOR MEMBERS are individuals and firms which sponsor qualified retirement and employee benefit programs. These members have no vote on RIIA business matters but are encouraged to contribute to RIIA's work through committee participation, conference administration, and participation in research initiatives. These members are encouraged to contribute their real-world experience to RIIA initiatives, with a view toward directly benefiting participants. These firms pay a discounted membership fee.

FINANCIAL ADVISOR MEMBERS are licensed financial professionals who provide retirement income planning advice and services to individuals. These members have no vote on RIIA business matters but are encouraged to contribute to RIIA's work through committee participation, conference administration, and participation in research initiatives. These members are encouraged to contribute their real-world experience to RIIA initiatives, with a view toward directly benefiting participants. These professionals pay a discounted membership fee.

RETURN FORM & PAYMENT TO:

Retirement Income Industry Association
101 Federal Street, Suite 1900
Boston, Massachusetts 02110