



the view across the silos



At the end of 2010, Americans had accumulated more than \$9 trillion in IRAs and defined contribution accounts.

Over the next two decades, the largest generation of retirees **ever** will be looking to turn those and other retirement savings into streams of income.

Every one of them is a potential customer.

Are you ready?

RIIA's mission as a national, not-for-profit organization is to define the future of retirement income in America. We do this by bringing the retirement income industry together to develop the products, processes and advisory services Americans need to create a secure retirement.



The Retirement Management JournalSM (RMJSM)

Providing a forum for ideas and a vehicle for communication

RIIA created this publication to fill an unmet need in the marketplace of ideas, and it represents an opportunity for financial professionals to help expand the body of retirement-management and income-planning knowledge.

Sponsored by Allianz Global Investors, the **Retirement Management JournalSM** is the first peer-reviewed publication that serves the needs of financial advisors who want to become specialists in all things retirement, especially those who hold the RMASM designation.

It is our goal that this journal will:

- Expand awareness of retirement-management issues and facilitate the dissemination of thoughtful research and practitioner insights
- Become a leading source on retirement-management and retirement-income topics
- Create a forum for discourse on an emerging and promising field not sufficiently addressed by existing silo-based industry groups and publications
- Function as a conduit to increase the overall RMASM body of knowledge

- Support RMASM certificate holders in staying current on the RIIA's developing body of knowledge

Find out more about subscribing to the RMJSM by calling us at **617-342-7390** or by visiting the web page: www.retirementmanagementjournal.org



RIIA is creating market growth by stimulating cooperative dialogue and promoting education.

RMJSM Subscription Order Form



Subscribe online at: www.retirementmanagementjournal.org or complete below and fax to the attention of Editor, RMJSM, at 617.342.7080.

Signature: _____ Date of Order: ____/____/____

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- I am a RIIA member
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Subscription Rates

Annual	For Individual Members		For Institutional Members	
	Basic	Full	Associate Member (5 Full Individual Memberships)	Regular Member (20 Full Individual Memberships)
Electronic PDF Version	\$50 (\$180 for non-members)	\$25 (50% discount) (Free if Full IM is also an RMA SM candidate or an RMA SM graduate)	Additional discount available for bundles beyond the initial 5	Additional discount available for bundles beyond the initial 20
Print Version	\$250 (\$900 for non-members)	\$125 (50% discount)	Additional discount available for bundles beyond the initial 5	Additional discount available for bundles beyond the initial 20



Article Submission Guide for the *Retirement Management Journal*SM

Terms and conditions for submitting articles to RIIA's *Retirement Management Journal*SM

Submission Criteria

The *RMJ*SM welcomes original, advanced papers on any aspect of retirement management, whether research-based or conceptual in nature. There are two tracks of advanced articles: one for academics, one for practitioners. Each track will be peer reviewed by a separate Peer Review Committee. Articles must be submitted at least four months prior to the next scheduled publication date to be considered for publication in that issue.

Additional Guidelines

- Only original work that is non-proprietary and can be published in RIIA's *RMJ*SM will be accepted
- Papers cannot have been previously published, or must have a waiver that they may be published, by another journal
- Papers must include a 1-page executive summary plus graphics to explain and support positioning; may not be longer than 5,000 words

*RMJ*SM will not publish brochures or other marketing materials, but analysis papers, white papers, thought leadership-positioned papers, and the like are welcomed.

Submission Specifications

Email articles for consideration to:

- editor@RetirementManagementJournal.org as an attached MS-Word document
- Font: Times Roman / Point size: 12
- Target Word Count: approximately 1,250–2,500

Please indicate headings and subheads with Heading 1, Heading 2, Heading 3, etc., prior to the appropriate section. Graphs and tables associated with submitted articles should be emailed as an attached MS-Excel file. Graphs

and tables may appear in b&w or color format.

Copyright Policy

Each author article submitted will remain the property of the author, with each author granting RIIA an unrestricted license to the article during the review period, and if published, post-publication.

If an article is not published, the author retains the copyright and the unrestricted license to the article granted to RIIA upon submission is extinguished.

Peer Review Process

Articles will be reviewed by members of the Journal's Editorial Advisory Board. That board will direct the article to either the Academic Peer Review Committee or the Practitioner Peer Review Committee.

The initial screening and peer-review process takes six to eight weeks. Authors will be notified as soon as the *RMJ*SM staff has heard from all of the reviewers. While manuscripts are in the review process, the *RMJ*SM asks that authors not submit their article to any other publication for consideration. The *RMJ*SM will not publish any articles that have been accepted or printed by other publications.

Revision Process

Upon completion of the review process, articles may be rejected, published as submitted or sent back to the author for revision. Authors who address the reviewers' suggestions can resubmit the article for final review and publication.

RMJSM Article Submission Form



Author(s): _____

Article Title: _____

Date: _____

Thank you for submitting your article to RIIA's *Retirement Management Journal*SM.

This **Article Submission Form** serves to grant RIIA an unrestricted license to the submitted article during the period the article is under review. The terms and conditions for submitting articles to RIIA's *Retirement Management Journal*SM are set forth in the Article Submission Guide. Please read these materials carefully and review the content with your counsel.

- I hereby certify that I have read and I understand the content of this Article Submission Guide.
- I further certify that I am authorized to make this submission and to sign this document in my own right or as an agent for my employer.

Signed: _____

(SIGNATURE)

Date: _____

Please complete above and fax to the attention of Editor, *RMJ*SM at 617.342.7080 or create a pdf of this completed document and email to editor@RetirementManagementJournal.org.



Advertise in the *Retirement Management Journal*SM

Publisher's Editorial Statement

The *Retirement Management Journal*SM is published by RIIA and is read by CFOs, senior vice presidents of finance, treasurers and controllers, etc., in the United States, Canada and overseas. Authors interpret new professional and technical developments for the senior financial executives and discuss the strategic and economic issues that reflect the financial executive's increasing involvement in general company management.

General Rate Policy

Rates in this media kit apply to advertising in the October 2011 issue and thereafter until further notice. Advertising contracts may be cancelled at the time new rates become effective without incurring an extra charge on advertising placed previously, provided the rate at which billings were made was earned up to the date of cancellation.

Contract/Copy Regulations

The publisher reserves the right to reject any advertising that it feels is not in keeping with the publication's standards. The advertiser agrees to assume liability for all content (including text, representations and illustrations) of advertising printed and also assumes responsibility for any claims arising therefrom made against the publisher. All advertising is subject to the publisher's approval. The publisher's liability for any error will not exceed the charge for the advertisement in question. Failure to make the order correspond in price or otherwise with the rate schedule is regarded only as a clerical error and is charged for upon the terms of the schedule and policy stated. When a change of copy covered by an uncanceled insertion order is not received by the closing date, copy run in a previous issue will be inserted. All orders are accepted subject to

accidents, fires, acts of God or other contingencies beyond RMJSM's control that prevent RMJSM from partially or completely producing, publishing or distributing an issue.

Creative Services Available

Our design team is available to create a custom ad for advertisers upon request. The creative services fee is 15% of the one time page rate for the ad size and location chosen. The finished ad will be placed in the Journal as well as supplied to the advertiser. For more information, please contact :

advertising@RetirementManagementJournal.org.

Digital File Specifications/Native Application Files

Quark and InDesign files: Files must include all fonts and images. Minimum resolution requirements are 300 dpi for full-color or grayscale artwork and 2400 dpi for bitmap (B&W, line art). Images and logos from websites are not usable for print ads. All fonts must be supplied, embedded or converted to outlines. PostScript fonts are acceptable; TrueType type are not acceptable. Send a low resolution PDF as proof with your files.

PDFs: PDF/X-1a. All high-resolution images and fonts are to be embedded; bleeds must be built into the file.

Send all electronic advertising materials to:

Robin Taliesin at:

advertising@RetirementManagementJournal.org

or call **781-631-4639** with ad-related questions.

Cancellation Dates

No cancellations accepted after insertion order closing date. Payment is due with insertion placement. No cash discount.



RMJSM Advertising Calendar and Deadlines

	ISSUE Date	Publication	Articles Due	Ad Reservation Due	Ad Art Due
2011	Volume 1, #1	March 2011	December 1, 2010	January 1, 2011	February 1, 2011
	Volume 1, #2	October 2011	June 1, 2011	August 1, 2011	August 15, 2011
2012	Volume 2, #1	January 2012	August 1, 2011	December 1, 2011	December 15, 2011
	Volume 2, #2	April 2012	October 1, 2011	March 1, 2012	March 15, 2012
	Volume 2, #3	July 2012	January 1, 2012	June 1, 2012	June 15, 2012
	Volume 2, #4	October 2012	April 1, 2012	September 1, 2012	September 15, 2012

Editorial themes

Issues alternate between a practitioner focus and an academic focus. Specific issue themes are being developed and will be posted in future versions of this document. If you have questions about a specific issue or theme suggestions, please contact editor@retirementmanagementjournal.org.

RMJSM Advertising Order Form



Advertising Rates

	Inside Full Page	Inside 1/2 Page	Inside Front or Back Cover	Outside Back Cover
Single Issue	\$5,500 (Full-Bleed)	\$3,000	\$8,250 (Full-Bleed)	\$9,900 (Full-Bleed)
2 Issues	7.5% discount	7.5% discount	7.5% discount	7.5% discount
4 Issues	20% discount	20% discount	20% discount	20% discount
6 Issues	33% discount	33% discount	33% discount	33% discount

Page Dimensions

FULL PAGE:

Non-bleed:

7.25" wide x 9.75" high

Bleed ad at trim size:

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With bleed added:

8.5" wide x 11" high

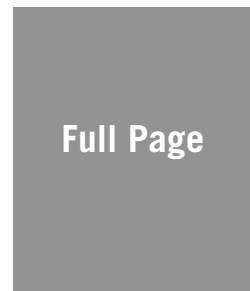
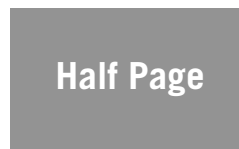
HALF PAGE HORIZONTAL:

Non-bleed:

7.25" wide x 4.75" high

No black and white advertisements will be accepted for back cover, inside front cover or inside back cover.

10% discount for non-bleed inside full page ads.



Contact Person: _____ Title: _____

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 Special placement request: IFC IBC BC
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 Frequency: 1x 2x 4x 6x

See RMJSM Advertising Information sheet for instructions regarding artwork submission.

RMJSM Article Reprint Order Form



Article reprints from the *Retirement Management Journal*SM

Thank you for your interest in the *Retirement Management Journal*SM reprints. We offer, full color 8-1/2 x 11" high quality, competitively-priced reprints in both printed form and pdf form for your usage. Each reprinted article is produced in its original form.

After ordering, you will receive your article reprints 2-3 weeks after payment is received. If you have questions about ordering reprints, please contact Robin Taliesin at: advertising@RetirementManagementJournal.org or call **781-631-4639** with reprint-related questions.

QUANTITY	50	100	250	500	750	1000
PAGE COUNT						
4 pg	\$7.12	\$4.02	\$2.15	\$1.53	\$1.30	\$1.20
8 pg	\$8.37	\$5.27	\$3.35	\$2.27	\$2.01	\$1.91
12 pg	\$9.45	\$6.35	\$4.25	\$3.01	\$2.82	\$2.65
16 pg	\$10.33	\$7.22	\$4.74	\$3.82	\$3.53	\$3.43
20 pg	\$11.10	\$7.86	\$5.23	\$4.50	\$4.32	\$4.22
24 pg	\$12.08	\$8.66	\$6.03	\$5.29	\$5.10	\$5.01

Prices are per unit cost; total for each reprint is unit cost times quantity. Reprint prices do not include shipping and handling. Prices are subject to change.

YES! I would like to purchase reprints of an article(s) featured in the *Retirement Management Journal*SM.

*Reprints will arrive 2-3 weeks after payment is received. *Our standard shipping is always UPS Ground unless otherwise specified.*

Signature: _____ Date of Order: ____/____/____

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Please see next page to detail article choice(s). Both sides of this form must be completed to process order.



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Unit Price: (see pricing on front) \$ _____

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ARTICLE 3

RMJ Issue Number: _____ Article Name: _____ Article Page Number: _____

Feature Title: _____ Number of Pages: _____ Quantity: _____

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To complete this order:

Please complete both pages and email to advertising@RetirementManagementJournal.org or fax to **781-631-2241**,
Attention: Robin Taliesin, Article Reprint.

After your request has been received with your information, we will inform you of your balance including shipping. In order to expedite this order, we will need to receive your payment in full. Please send payment to:

Attention: Deborah Burkholder, Article Reprint, RIIA, 101 Federal Street, Suite 1900, Boston, MA 02110

Phone: 617-342-7390, Fax: 617-342-7080

Email : Deborah@RIIA-USA.org



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