LIMRA•LOMA

Secure Retirement INSTITUTE®

Resources to Grow Your Retirement Business

Many Americans tell us they are ***NOT*** financially ***PREPARED*** for retirement, and many retirees report they are ***UNCERTAIN*** how to ***MANAGE*** their assets.

The LIMRA LOMA Secure Retirement Institute helps members advance retirement readiness and the financial security of their clients through peer forums, research, and learning and development programs. Together, we foster industry innovation and promote best practices.

Members are accessing Secure Retirement Institute resources to:

- Boost profitability
- Enhance consumer engagement
- Increase client and asset retention
- Expand distribution
- Grow market share
- Address threats, including industry disruptors
- Understand and adapt to regulatory changes
- Attract top talent
- Increase productivity through a knowledgeable workforce

RESEARCH

Gain Insight on Market Trends and Leading Practices

Refine business strategies and make crucial decisions with actionable findings from retail and institutional retirement market research. Use our research to:

- Benchmark sales
- Identify emerging markets
- Understand client and advisor preferences
- Gain insight into the competitive and regulatory environments

Experienced staff can help you apply research findings and industry best practices to your business.

Navigate Regulatory Change

With the unprecedented regulatory change facing the industry, you can find relevant research and expert thought pieces on our website. We are also working with our member firms to help them assess, prepare for, and implement business practices that will enable them to thrive in new regulatory environments.

LEARNING AND DEVELOPMENT

Connect With Peers From Across the Industry

Participate in peer forums and industry conferences to discuss market trends, regulatory developments, and effective business practices. Participants include asset management firms, banks, broker dealers, insurance carriers, record keepers, wealth management companies, and TPAs.

PEER FORUMS *Partial List of Participating Firms*

AIG	Charles Schwab	Janus	Nationwide	State Street Global Advisors
AllianceBernstein	Edward Jones	John Hancock	New York Life	TIAA-CREF
Allianz	Empower	J.P. Morgan	OneAmerica	Transamerica
American Funds	Fidelity	Lincoln Financial Group	Pacific Life	T. Rowe Price
Ameritas	Franklin Templeton	LPL	PIMCO	UBS
AXA	Genworth	MassMutual	Principal Financial Group	Vanguard
Bank of America	Great American	Merrill Lynch	Prudential	Voya
BlackRock	Guardian	MetLife	Securian	Wells Fargo

Improve Results with Specialized Services

Access products and services that will help you grow your company's retirement business, improve profitability, and manage risk. All offerings are grounded in our research and a century's experience of serving the financial services industry. Services include:

- Custom research — In-depth or quick readings of the market
- Consulting on strategy, product development, marketing, distribution, compensation, and regulatory compliance
- Speakers bureau — Our experienced speakers present thought provoking information and insight for your internal or external audiences
- AnnuityCompass™ — Target your resource use with comprehensive market data
- Annuity Customer Assurance Program (CAP)™ — Reduce litigation risk through post-purchase surveys
- AnnuityXT™ — Provide online annuity CE training and company-specific product training
- Ready-2-Retire™ — Help consumers imagine retirement and prioritize their goals and concerns with this interactive online tool.

Benefit from Professional Development

The Fellow, Secure Retirement Institute (FSRI®) is uniquely focused on the retail and institutional aspects of the retirement business. Professionals in operations, technology, customer service, and marketing benefit from this effective eLearning program. The FSRI goes beyond job-specific training to help your organization improve:

- Talent mobility
- Customer satisfaction
- Associate engagement

Access our research and learn how we can help you at www.secureretirementinstitute.com

LEARN HOW WE CAN HELP YOU

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