

ASRI™
FSRI™



**A New Way to
Learn about
Retirement**

LOMA
**Secure
Retirement
INSTITUTE™**

LOMA

Secure Retirement INSTITUTE™

Designed specifically for employees in asset management firms, insurance companies, distribution organizations, and recordkeeping companies, the Fellow, Secure Retirement Institute™ (FSRI™) program uniquely teaches the retirement business, both institutional and retail. This comprehensive and contemporary program enables learners to develop a solid understanding of the “what, why, and how” of the retirement industry, and provides practical insight to improve participant outcomes. The FSRI will help companies ensure that their employees have the knowledge and skills to:

- Support retirement plans and products
- Deliver effective service and solutions to clients and advisors
- Address the challenges and opportunities presented by the evolving retirement marketplace

The FSRI program covers these primary topics:

- The retirement environment, the retirement industry, and retirement savings and income needs
- Retirement plans and products and regulatory and tax issues
- Planning for retirement and management of retirement income
- Marketing, service, support, and other company operations associated with the retirement industry
- Key business and financial concepts that build a deeper understanding of the retirement industry

Virtually all employees in financial services companies and distribution firms in the retirement industry can benefit from this comprehensive learning experience. It's a natural fit for employees whose jobs require an understanding of retirement savings and income plans and products, such as employer-sponsored retirement savings plans, IRAs, annuities, pensions, mutual funds, and other investments.



A New Way to Learn About Retirement



The courses in the FSRI program are divided into three levels* leading to the awarding of a certificate and professional designations:

Certificate in Retirement Essentials

Delivered in a highly interactive online format, these courses provide an overview of the retirement marketplace and a strong foundation in retirement principles, plans/products, and planning.

SRI 111: Retirement Marketplace

SRI 121: Retirement Savings and Investments

SRI 131: Planning for a Secure Retirement

Associate, Secure Retirement Institute™ (ASRI™)

Also delivered in a highly interactive online format, the ASRI courses teach advanced concepts in generating successful retirement outcomes and the application of retirement industry knowledge to marketing, business acquisition, administration/operations, service, and other functions that support the business.

SRI 210: Successful Retirement Outcomes

SRI 220: Retirement Marketing and Business Acquisition

SRI 230: Retirement Administration and the Customer Experience

Fellow, Secure Retirement Institute™ (FSRI™)

Delivers knowledge of broad challenges facing society and the retirement industry, as well as strategic approaches for meeting these challenges, to equip employees for problem solving, innovation, and advancement in their careers.

SRI 500: Transforming Retirement Security

**The content builds through each level; LOMA recommends taking the courses in order. However, courses may be taken individually or in any order.*

Everyone will benefit from the FSRI™ Program!

The FSRI program helps **employees**:

- Gain an understanding of the plans and products they support, the role of those plans and products within a retirement plan, and complex retirement planning decisions
- Understand how sponsors, participants and advisors connect to the business
- Improve their job performance and readiness for future job opportunities by providing a strong foundation that complements company-specific training
- Enhance their value to the company and earn a portable, job-relevant professional designation from a highly regarded industry education provider
- Acquire the knowledge they need to prepare for their own retirement

The FSRI program also supports **companies** in their efforts to:

- Provide employees with a broad knowledge of the retirement industry while teaching them how to effectively listen, connect and ultimately provide superior service to customers
- Develop industry professionals whose knowledge of retirement principles, plans and products, company operations, and other business issues will empower them to make significant contributions toward organizational and industry goals
- Promote employee engagement and retention through enhanced job performance and personal growth
- Enhance the organizational talent pool and develop future business leaders



For more information, contact your company's LOMA Educational Representative.
If you are an independent student, contact LOMA's Office of the Registrar.

www.FSRIdesignation.org
1-800-ASK-LOMA

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