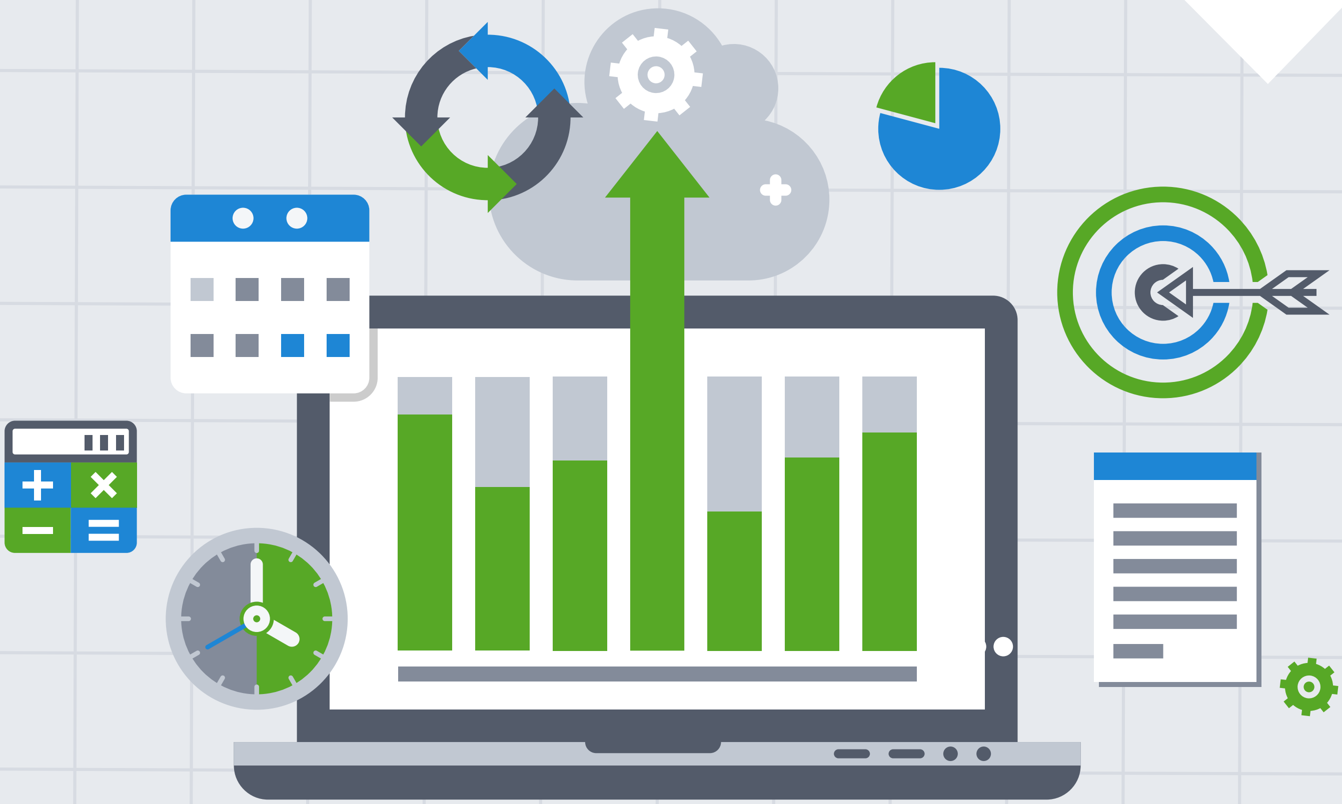
Accelerate Your Career

FSRI™
ASRI™



LOMA Secure Retirement Institute®

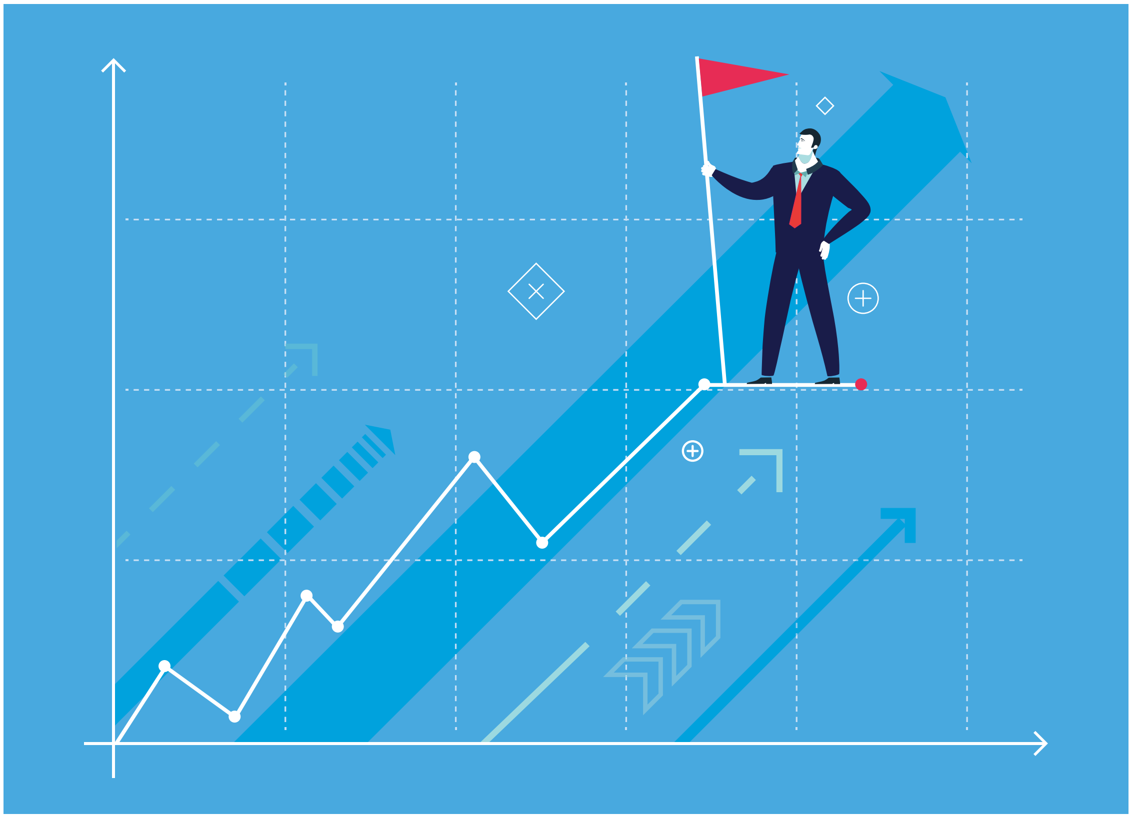
LOMA®

The New World of Retirement

Distinguish yourself as a respected professional in the retirement industry.

The Fellow, Secure Retirement Institute (FSRI) program builds a solid foundation of business knowledge and an awareness of the challenges to a successful retirement outcome. It offers relevant, contemporary content intended to drive innovative thinking and creative solutions, helping you to connect, collaborate and perform effectively with partners and customers.

It is an opportunity to distinguish yourself with a designation, and drive your own development as you prepare for current challenges and future career growth.



The FSRI program:

- Focuses on relevant, recent knowledge and contemporary issues
- Encourages innovative thinking to drive efficiency and performance
- Builds confidence critical to serving customers

Navigate transformation in the retirement space faster by making a valuable investment in yourself!

FSRI Level	Transforming Retirement Security		
ASRI Level	Successful Retirement Outcomes	Retirement Marketing & Business Acquisition	Retirement Administration
Certificate Level	Retirement Marketplace	Retirement Saving & Investments	Planning for a Secure Retirement

The Certificate and ASRI Levels are designed as an easy-to-approach, interactive, and self-paced experience, and are formatted for busy schedules. Learning progresses with ease and in privacy since testing is integrated into the course. You can enroll in one or more courses or pursue a designation.

According to a recent survey:

83% of respondents believe in regularly refreshing their skills and competencies to enhance employability.

81% of respondents believe that keeping their skills and competencies up to date is their own responsibility.

65% of respondents have done activities in the last 12 months in order to upskill themselves in relation to work .

Randstad Workmonitor, September 2017. Results for U.S. respondents.

Level 1: Certificate in Retirement Essentials

The first level in the Fellow, Secure Retirement Institute (FSRI) program provides an overview of the retirement industry and foundational knowledge in retirement principles, planning and underlying support services.

Level 1: Certificate in Retirement Essentials

SRI 111 – Retirement Marketplace

Provides context and knowledge about the retirement, savings and investment environments in both the retail and institutional markets. It covers:

- Critical concepts that affect retirement planning
- Overview of government-sponsored programs
- Strategies to help manage and monitor risks

Develop industry knowledge on various and contemporary aspects of the retirement business…in both retail and institutional markets

SRI 121 – Retirement Savings and Investments

Takes a close look at both retail and institutional retirement plans and investment instruments, focusing on:

- Types of employer-sponsored plans and their purpose, including defined benefit, defined contribution, and nonqualified plans
- Types of investment instruments, including stocks, bonds, mutual funds, and annuities
- Advantages and disadvantages of various investment instruments in retirement plans, including nonqualified plans and IRAs
- General rules on the taxation of plan distributions

- *98% agree the course is easy to use*
- *96% said the content is easy to understand and engaging*
- *96% would recommend the FSRI*

SRI 131 – Planning for a Secure Retirement

Examines the components of a comprehensive retirement planning process, and identifies tools to help individuals create their personal retirement plan.

- Factors that make retirement planning a hot topic
- Projecting income, and monitoring and managing retirement preparedness
- How inflation and longevity impact future income needs

Since Inception:

- *14,763 Enrollments*
- *1,205 Associates, Security Retirement Institute*
- *200+ Companies*

As of October 24, 2017

Level 2: The Associate, Secure Retirement Institute (ASRI)

Courses in the ASRI level teach advanced concepts in generating successful retirement outcomes. It applies Level 1 knowledge to marketing, new business development, administration, and other activities and services supporting the industry.

Level 1, plus:

SRI 210 – Successful Retirement Outcomes

Focuses on sources of retirement income, and strategies for preparing for future income needs. This course presents:

- Importance of asset allocation and rebalancing within the retirement framework
- Projecting retirement readiness and solutions for closing the gap
- Income-generating approaches in the decumulation phase

SRI 220 – Retirement Marketing and Business Development

Educates professionals about the role of various stakeholders, including advisors, and dynamics of the business development process in institutional and retail markets. The primary focus is on market segmentation, product development, distribution and customer engagement. Topics include:

- Plan design, product development strategies and processes, and distribution channels
- Impact of consumer behavior, economic conditions, and government policies on marketing and distribution strategies
- How successful customer experience management (CEM) programs help to create, maintain, and manage long-term relationships

SRI 230 – Retirement Administration

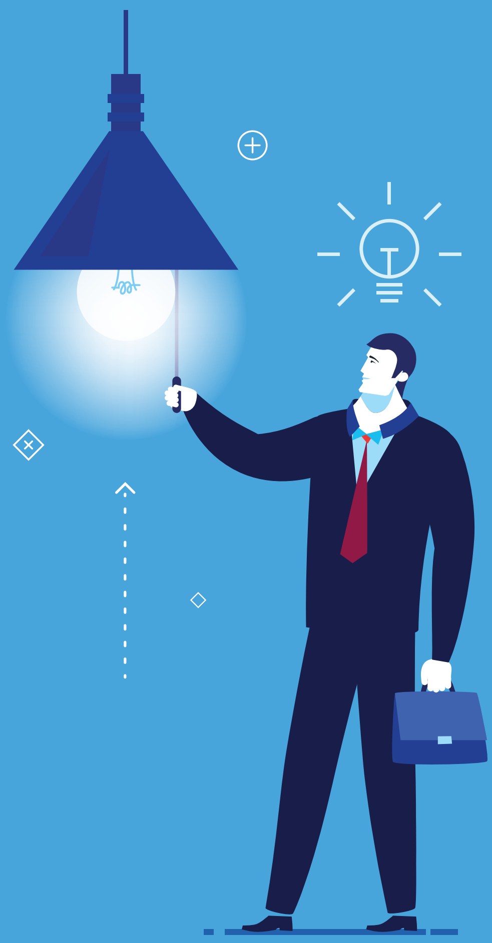
Presents administrative activities necessary for smooth plan operations while developing and maintaining a positive customer experience. Learn more about:

- Stakeholders and service providers, and their roles and responsibilities
- The value of an exceptional customer experience in retaining assets and strengthening plan health
- The impact of information technology, risk management, and regulation on retirement administration
- Allocating resources for administrative, recordkeeping, and reporting and disclosure activities

Level 3: The Fellow, Secure Retirement Institute (FSRI)

"We know that better service to our customers – including advisors, service providers, plan sponsors, and individual investors – is a direct result of employees who have committed to building knowledge, skills, and expertise. Shifting client demographics and preferences present new demands daily. Delivering the expertise clients value can be difficult to execute. We support the efforts of a workforce dedicated to staying in front of that next "shift."

"Initially, I was apprehensive about the assignments, but as I continued to work on them, I realized the power and impact – the most detailed knowledge that I gained from the program was through those assignments."



SRI 500 – Transforming Retirement Security

This capstone course presents a unique and contemporary approach to understanding the forces and trends shaping retirement systems globally.

- Economic, demographic, and regulatory issues and how they affect the retirement business
- In-depth understanding of the structure, challenges and the future of the US retirement system, along with a comparison to systems in other nations, such as Australia, Canada, Chile, Japan and the Netherlands
- Innovation and its role in strengthening the future of retirement industry

For more information

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

www.loma.org
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