Accelerate Your Career

Advancing the financial services industry by empowering our members with knowledge, insights, connections, and solutions

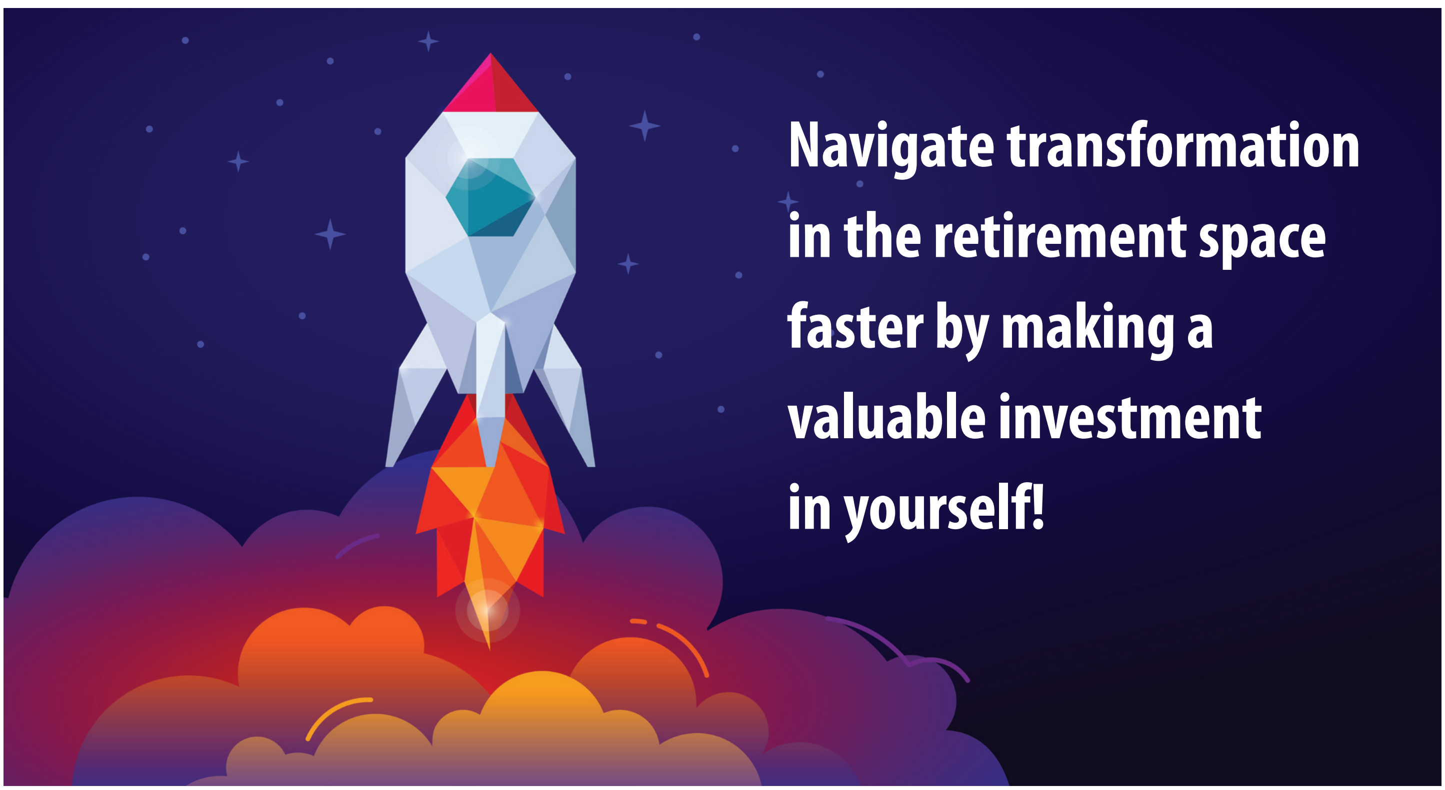
Retirement Education for Financial Professionals

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 while preparing you to support successful retirement outcomes and enhance your personal and professional brand in the retirement industry. It offers relevant, contemporary content intended to drive innovative thinking and creative solutions to help you to connect, collaborate, and perform effectively with partners and customers.

This rigorous program gives you an opportunity to distinguish yourself with a globally-recognized designation, and accelerate your career with a contemporary understanding of the key elements of the retirement business.



The FSRI program:

- Uniquely provides a comprehensive understanding of the retirement business
- Encourages innovative thinking to drive efficiency and performance
- Builds confidence critical to serving customers

Build Your Personal Brand in Retirement

FSRI Level
- Transforming Retirement Security

ASRI Level
- Successful Retirement Outcomes
- Retirement Marketing & Business Acquisition
- Retirement Administration

Certificate Level
- Retirement Fundamentals
- Retirement Saving & Investments
- Planning for a Secure Retirement

The Certificate and ASRI level courses are presented in our highly interactive online format and provide an engaging learning experience. Modular exams are integrated into the courses, so learning progresses according to your schedule.

Survey results indicate that:

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

Develop industry knowledge about of the retirement business in both retail and institutional markets. The first level in the Fellow, Secure Retirement Institute (FSRI) program provides an overview of the retirement industry and foundational knowledge in retirement principles, products, and plans as well as retirement planning and underlying support services.

Level 1: Certificate in Retirement Essentials

SRI 111 – Retirement Fundamentals

Provides a holistic view of the retirement system and industry including the evolution of the system, regulations that affect the system and the three pillars of retirement resources. New features for 2020 include:

- A new format of mobile device-enabled scrollable pages
- Design-thinking-based figures to reinforce important ideas and examples to help learners apply concepts to the real world
- Animated videos that explain challenging concepts in a visual way

All Level 1 and Level 2 courses are available as highly interactive, online courses!

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
- 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

- ***96% said the content is easy to understand and engaging***
- ***96% would recommend the FSRI***
- ***89% say the information is relevant to my job***

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 so essential
- Projecting income and monitoring and managing retirement preparedness
- How inflation and longevity impact future income needs

Since inception:

- ***25,100+ enrollments***
- ***2,300+ ASRIs***
- ***660+ FSRIs***
- ***1,750+ companies participating***

As of November 2020

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

The ASRI curriculum teaches advanced concepts in generating successful retirement outcomes. It builds on Level 1 knowledge with information about 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:

- 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 Acquisition

Educates professionals about the role of various stakeholders, including advisors, and the dynamics of the business development process in institutional and retail markets. The primary areas of focus include the sales process, 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 effective and efficient 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

Coming in early 2021! **SRI 240--Profitability in the Retirement Business** provides an introduction to the financial aspects of the retirement business by describing:

- How companies make money and the various risks to a company's profitability
- How companies build profitability into retirement products and services
- Strategies companies use for achieving profitability in the retirement business
- The environment in which retirement businesses operate, including emerging trends and potential opportunities.

Note that SRI 240 is an optional course during 2021. Starting January 1, 2022, SRI 240 will be required to earn the ASRI designation.

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

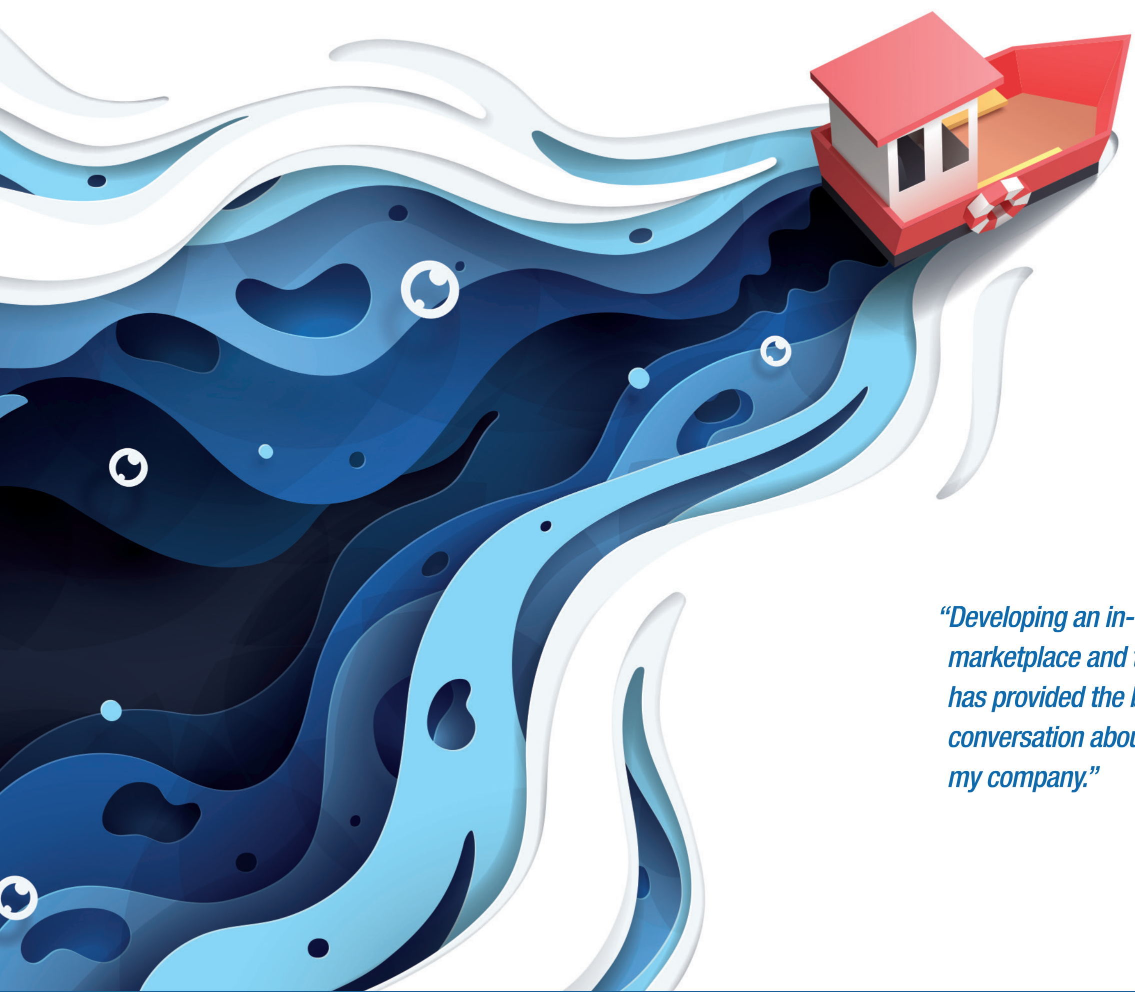
ASRI, plus:

SRI 500 – Transforming Retirement Security

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

- Economic, demographic, and regulatory issues and how they affect the retirement business
- In-depth understanding of the structure, challenges and the future of the U.S. 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 the retirement industry

"The FSRI designation program provided me with a solid understanding of the pillars that support retirement programs in the United States as well as the opportunities that exist to make these programs more sustainable."



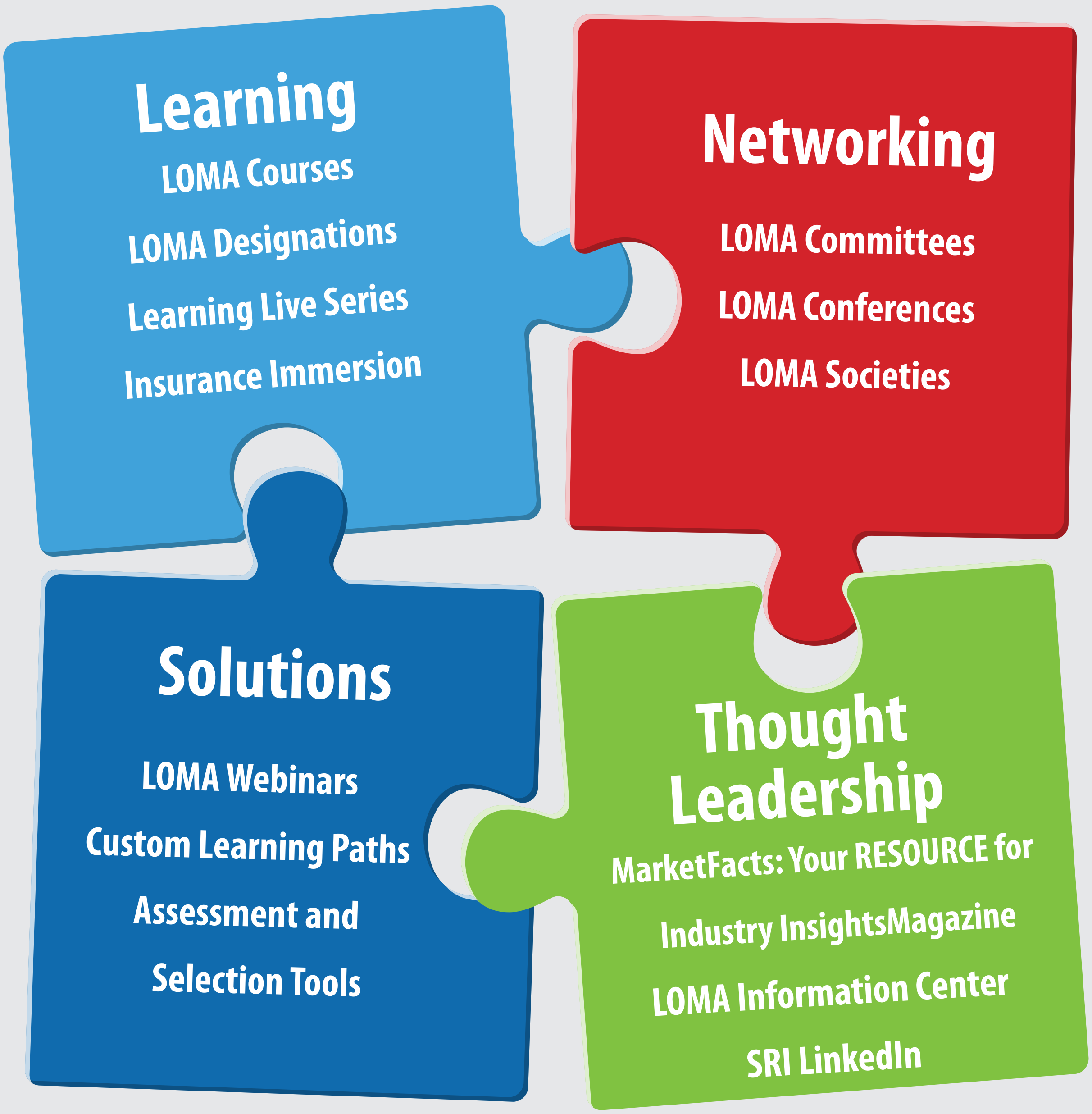
"Developing an in-depth understanding of the retirement marketplace and the many types of retirement products has provided the background I need to contribute to the conversation about retirement products and planning in my company."

Continuous Learning

More Opportunities for Upskilling

LOMA's professional designation programs are recognized worldwide and demonstrate completion of significant knowledge- and skills-based learning experiences.

Designations are just one piece of the professional development puzzle. Our online and onsite training and education programs, combined with committees, conferences, cutting-edge publications, and more are designed to measurably improve management and operations.



Explore new ways to drive improved performance, growth, and innovation at www.loma.org.

For more information:

Contact your company's LOMA Educational Representative.

If you are an independent student,
contact LOMA's Office of the Registrar.

Customers in the U.S. and Canada, please contact:
membersolutions@loma.org

International Customers, please contact: intl@loma.org

"Overall the program is very informative! I understand retirement challenges better after completing the courses. I gained a better understanding of how we do things in our company and can suggest ways on how we can improve. It makes it easier for me to explain our plans and products."

"This type of information is very important to understand when working in the life insurance industry. I can confidently explain to customers where our life insurance products fit into our overall retirement plan. It has piqued my curiosity to learn more about products."

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