

RETIREMENT SERVICES: Flexible Learning Path



Start with the recommended learning path on page 2, then select from the options below to complete your personalized learning plan

TOPICAL KNOWLEDGE

[Introduction to IRAs](#)

[Traditional IRA Distributions](#)

[Tackling IRA-to-IRA Transfers & Rollovers](#)

[Traditional IRA RMDs](#)

[Roth IRA Distributions](#)

TARGETED DEVELOPMENT

Foundational

[Retirement Fundamentals \(SRI 111\)¹](#)

[Retirement Savings & Investments \(SRI 121\)¹](#)

[Planning for a Secure Retirement \(SRI 131\)¹](#)

Proficiency

[Successful Retirement Outcomes \(SRI 210\)](#)

[Retirement Marketing & Business Acquisition \(SRI 220\)](#)

[Retirement Administration \(SRI 230\)](#)

Expertise

[Transforming Retirement Security \(SRI 500\)](#)

¹ Certificate in Retirement Essentials awarded upon completion of these 3 courses

LEADERSHIP DEVELOPMENT

Industry Designation: [Fellow Secure Retirement Institute \(FSRI\)](#) [Associate Secure Retirement Institute \(ASRI\)](#)

Networking & Learning Events: [Industry Conferences](#) [Retirement Services Committees](#) [Webinars](#) [Facilitated Learning](#) [Societies](#)

Resources – Trending Topics, Studies & Reports: [Secure Retirement Institute](#) [Retirement Research](#)

Get Started with the FSRI Level 1

Earn Your Certificate in “Retirement Essentials”

9 Week Learning Path

STUDY DATES	Done ✓	<u>Retirement Fundamentals (SRI 111)</u>	STUDY DATES	Done ✓	<u>Retirement Savings & Investments (SRI 121)</u>	STUDY DATES	Done ✓	<u>Planning for a Secure Retirement (SRI 131)</u>
Week 1 (4 hrs): _____ _____ _____		Module 1 (4 lessons): Retirement Overview	Week 4 (6 hrs): _____ _____ _____		Module 1: (3 lessons) Non-Qualified Annuities	Week 7 (4 hrs): _____ _____ _____		Module 1: (2 lessons) The Importance of Planning
Week 2 (3 hrs): _____ _____ _____		Module 2 (2 lessons): Planning and Saving for Retirement	Week 5 (6 hrs): _____ _____ _____		Module 2: (3 lessons) Investment Products & IRAs	Week 8 (6 hrs): _____ _____ _____		Module 2: (3 lessons) The Retirement Plan
Week 3 (5 hrs): _____ _____ _____		Module 3 (3 lessons): Achieving Retirement Readiness	Week 6 (4 hrs): _____ _____ _____		Module 3: (2 lessons) Employer Sponsored Retirement Plans	Week 9 (6 hrs): _____ _____ _____		Module 3: (3 lessons) Specialized Components of a Retirement Plan

What people are saying about the FSRI Level 1 courses: <https://www.loma.org/en/professional-development/certificates/fsri-level-1/>
 “Advance Your Knowledge” webinars to help you build a personalized learning plan: <https://www.loma.org/en/events/webinars/ayk-webinars/>