

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](#)

[Social Security – Is the Sky Falling?](#)

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 Plans Committee](#)

[Webinars](#)

[Facilitated Learning](#)

Resources – Trending Topics, Studies & Reports:

[Retirement Research](#)

Get Started with the FSRI Level 1

Earn Your Certificate in “Retirement Essentials”

9 Week Learning Path

STUDY DATES	Done ✓	Retirement Fundamentals (SRI 111)	STUDY DATES	Done ✓	Retirement Savings & Investments (SRI 121)	STUDY DATES	Done ✓	Planning for a Secure Retirement (SRI 131)
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/accelerate-impact-suite/flmi-level-1/>

“Advance Your Knowledge” webinars to help you build a personalized learning plan: <https://www.loma.org/en/events/webinars/ayk-webinars/>