

# The FIRST Group

The FIRST Group is a study group of senior researchers in financial services organizations. It was founded IN 1994 by Matt Greenwald and Jim Sharkey, then of The Equitable, to allow a small group of researchers to meet regularly to discuss key issues and get input from leading experts on topics of interest. Members are drawn from financial services companies, trade associations, research institutes and other organizations. The diversity of backgrounds makes the group discussions especially valuable.

## About the Group:

- The group focuses on retirement, employee benefits and investing behavior.
- The meetings typically comprise group discussions, member presentations, and presentations by experts from government, academia, and research organizations.



## Membership:

Membership is by invitation only and a two-thirds vote of the membership is required for a new member to be admitted to the group. The group meets twice a year. The Group also serves as an important contact network where Members interact to get information.

## Organizations Represented:

- Employee Benefit Research Institute
- FINRA
- Greenwald Research
- Insight Investments
- Insured Retirement Institute
- Investment Company Institute
- JP Morgan
- LIMRA
- TIAA Institute
- Transamerica Center for Retirement Studies
- T. Rowe Price
- Voya
- Western and Southern