

Retirement Management Executive Forum (RMEF)

Driven by industry demand for a forum that enables senior executives focused on the retirement market to periodically gather and discuss the retirement market, the Retirement Management Executive Forum (RMEF) was founded in 2003. Adhering to a study group format and drawing on membership input, the RMEF has evolved into a unique and exclusive forum focused on the retirement income business and dedicated to helping member companies gain insights and knowledge that allows them to excel in addressing retirement market needs.



Learn from exclusive network of industry leaders



Roundtable discussion of key market issues and solutions



Focused information and analysis



Membership Benefits:

- **Group of diverse financial services executives focused on retirement income, including distribution companies, investment companies, and annuity companies.** The RMEF is a study group of executives discussing retirement income from various perspectives. The size of this multifaceted group allows for a meaningful and free exchange of ideas. **Membership is by-invitation-only and limited, typically, to only one representative per firm.**
- **Exclusive focus on retirement market issues, allowing for relevant and efficient discussions.** The program's scope transcends traditional product lines and sectors to address retirement management market issues, opportunities, processes, and solutions that span the full product/business line spectrum.
- **In-person and virtual meetings stimulate discussion and insight.** RMEF agendas provide practical information, ideas, and key takeaways. Agendas include roundtable discussions on pre-meeting member surveys, member presentations on key initiatives, and presentations by carefully selected experts designed to provide new knowledge. Experts such as Wade Pfau, Michael Finke, David Blanchett, Michael Kitces, and Tim Pfeifer often focus on how to present retirement income in ways that will resonate with advisors and consumers.
- **Meetings promote networking with knowledgeable industry peers, who can be a key resource over the course of the year.** The RMEF has developed a culture of sharing and cooperation. This promotes effective networking and permits members to contact each other and brainstorm about key issues.
- **Exceptional value at a reasonable cost.** Individual RMEF members and their companies are enriched by education, research, and thoughtful discussion with peers and experts across the industry. They take these learnings back to their companies to help with product, service, and communications strategy.

Member Companies

AllianceBernstein	J. P. Morgan	Security Benefit
American Funds	Lincoln Financial	Symetra
Ameriprise	MassMutual	Thrivent
Charles Schwab	Merrill Lynch	TIAA
CUNA Mutual	Nationwide	USAA
Edward Jones	New York Life	Voya
Empower	Pacific Life	Wells Fargo
Fidelity	Principal Financial Group	
Hartford Funds	Prudential	



For additional information or a more detailed description of the program, contact Matt Greenwald at mathewgreenwald@greenwaldresearch.com.