

RETIREMENT MANAGEMENT EXECUTIVE FORUM

The **Retirement Management Executive Forum (RMEF)** was founded in 2003 to provide an opportunity for executives from a diverse set of companies focused on the retirement market to discuss key issues and shared concerns. The study group now has Members from 31 leading companies in the retirement business.

Membership is by invitation only and limited to one executive per firm. Dues are \$7,250 per year.



MEMBER MEETINGS INCLUDE:

- Two in-person and three virtual meetings per year
 - Presentations by outside experts
 - Roundtable discussions on key issues
 - Reports on key research studies
 - Case study presentations
- Reports on two specially-designed RMEF surveys
- Summary report on each meeting
- Access to online member portal



PAST DISCUSSION TOPICS

- How retirement marketing has adapted to a Post-COVID, quasi-virtual world
- Meeting the unmet needs of pre-retirees and retirees
- Impact of high interest rate environment and inflation
- Opportunities for and challenges facing retail retirement companies and plan providers



PAST PRESENTERS

- James Poterba
- Shlomo Benartzi
- Wade Pfau
- Michael Kitces
- Joseph Coughlin
- Michael Finke



MEMBERSHIP BENEFITS:

- **Specially designed roundtable discussion on key issues** and concerns impacting the retirement market.
- **New ideas, perspectives, and information** from leading experts and industry peers. The resulting learnings provide input on tactics and strategies in a wide variety of areas.
- **Networking with other Members** through a culture of sharing and cooperation.
- Discussions and presentations on **topics that matter to your organization.**
- **Benefits to your organization** through ability to disseminate reports of the meeting and presentation decks provided by outside experts.

MEMBER COMPANIES INCLUDE:

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| • AllianceBernstein | • CUNA Mutual Group | • MetLife | • Security Benefit |
| • Allianz Life | • Edward Jones | • MFS Investment Management | • Thrivent Financial |
| • American Century | • F & G Life and Annuities | • Nationwide Financial | • TIAA |
| • Ameriprise Financial | • Fidelity Investments | • New York Life | • T. Rowe Price |
| • Annexus | • Hartford Financial | • Pacific Life | • Voya Financial |
| • Bank of America/Merrill Lynch | • iCapital Solutions | • Principal Financial Group | • W & S Financial Distributors |
| • Capital Research Management/American Funds | • JP Morgan | • Protective Life | |
| • Charles Schwab & Co. | • LGIM America | • Prudential | |
| • Corebridge Financial | • MassMutual Financial | • Sammons Institutional Group | |