ExecutiveForums
Small Groups, Big Ideas

The FIRST Group

The FIRST Group (Financial and Insurance Research Study Team) is a study group of senior researchers in financial services organizations. It was founded in 1994 to allow a small group of researchers 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 are typically comprised of group discussions, member presentations, and presentations by experts from financial services firms, marketing and public relations firms, 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, once in person in Washington, DC and once in a virtual meeting. The Group also serves as an important contact network where Members interact to get information.

Organizations Represented:

- Edward Jones
- Employee Benefit Research Institute
- FINRA Investor Education Foundation
- Greenwald Research
- Insight Investments
- Insured Retirement Institute
- Investment Company Institute
- LIMRA
- Morningstar
- TIAA Institute
- Transamerica Center for Retirement Studies
- T. Rowe Price
- Voya

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