

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 \$7,500 per year.



EXAMPLES OF PAST PRESENTERS

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



MEMBERSHIP BENEFITS:

- **Specially designed roundtable discussions 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
- **Benefits to your organization** through ability to disseminate reports of the meeting and presentation decks provided by outside experts

EXAMPLES OF PAST DISCUSSION TOPICS

- Is it better to be an innovator or fast follower?
- Update on marketing: How has it adapted to a Post-COVID, quasi-virtual world?
- Meeting the unmet needs of pre-retirees and retirees



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 surveys a year of RMEF members and other executives of retirement companies on key issues
- Summary report on each meeting

MEMBER COMPANIES

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|---------------------------------|---------------------------|-----------------------------|-------------------------------|
| • AIG | • Charles Schwab & Co. | • MassMutual Financial | • Prudential |
| • AllianceBernstein | • CUNA Mutual Group | • MetLife | • Sammons Institutional Group |
| • Allianz Life | • Edward Jones | • MFS Investment Management | • Security Benefit |
| • American Century | • Fidelity Investments | • Nationwide Financial | • Thrivent Financial |
| • Ameriprise Financial | • Hartford Financial | • New York Life | • TIAA |
| • Annexus | • iCapital Solutions | • Northwestern Mutual | • T. Rowe Price |
| • Bank of America/Merrill Lynch | • JP Morgan | • Pacific Life | • Voya Financial |
| • Capital Group/American Funds | • Lincoln Financial Group | • Principal Financial Group | |