



INSURED RETIREMENT INSTITUTE MEMBER BENEFITS



WHO IS IRI?

The Insured Retirement Institute (IRI) is the leading association for the retirement income industry, and is the only association that represents the entire supply chain of insured retirement strategies. IRI also proudly leads a national consumer coalition of more than thirty organizations.

WHAT IS OUR MISSION?

As a not-for-profit organization, IRI provides an objective forum for communication and education, and advocates for the sustainable retirement solutions Americans need to help achieve a secure and dignified retirement.

WHO DO WE SERVE?

IRI members include major insurers, asset managers, broker-dealers/distributors, banks, solution providers and more than 150,000 financial professionals. Through its consumer education and outreach efforts, IRI is also committed to supporting the retirement planning needs of all Americans.

HOW DO WE HELP?

From leading industry research and advocacy, to practice management tools and client engagement materials, the IRI team works to improve consumer education and knowledge of retirement income strategies through public engagement campaigns, including National Retirement Planning Week®. IRI also provides a leading voice in the media promoting the value of retirement income planning.

EDUCATION

ENGAGEMENT

RESEARCH

ADVOCACY

EDUCATION

- **More than 50 FINRA-reviewed client materials**, including fact sheets, checklists and topic primers.
- **Continuing education webinars**, presenting informative public policy and industry updates.
- **SmartBrief news service** for relevant, at-a-glance industry news.
- **Practice management tools**, including innovative tools and interactive calculators to help financial professionals assist their clients.
- **CE and Annuity Training**, in partnership with RegEd.
- **IRI Innovation Exchange newsletter**, providing industry operations and technology updates.
- **Retirement Income Certified Professional® (RICP®) Designation** discounted rates.

ENGAGEMENT

- **IRI Conferences:** Save on registration for IRI conferences, where the industry's most influential professionals network, learn, and strategize to grow their market share.
- **Committee Participation:** Demonstrate your thought leadership by participating on IRI's committees with your peers.
- **Brand Exposure:** Showcase your brand through speaking roles at industry events, peer-selected industry awards, and exclusive sponsorship opportunities.

RESEARCH

- **Exclusive IRI Research**, covering various demographic groups, industry trends, and the marketplace.
- **IRI Research Roundup**, an at-a-glance collection of industry-wide research and economic commentary.
- **IRI FACT BOOK**, the most reliable source of information and data on lifetime income strategies.
- **IRI Retirement Income Guide**, a FINRA-reviewed guide for clients on how retirement income products fit into a retirement plan.
- **Industry Sales Data**, including quarterly industry-wide annuity sales reports.
- **IRI INSIGHT**, a retirement planning newsletter covering the latest industry news, issues and trends.

ADVOCACY

- **Action Center**, IRI's online advocacy platform that enables all members to make their voices heard on Capitol Hill.
- **IRI Government Affairs Update**, an e-newsletter with the latest updates on public policy issues and IRI advocacy initiatives.
- **Legislative & Regulatory Trackers**, proprietary trackers that help financial professionals monitor the laws and regulations that affect their businesses state-by-state.
- **Financial Advisor & Broker-Dealer Public Policy Centers**, providing the latest news on public policy and regulatory issues impacting broker dealers and financial advisors.
- **Advocacy Issue Backgrounders**, at-a-glance fact sheets on the public policy issues affecting the marketplace.

Join IRI today! For more information, please contact IRI:
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