



Insured Retirement Institute

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Contact: Chris Paulitz or Danielle Holland
dholland@irionline.org or 202.469.3007

IRI: One-Year Anniversary of Successful Rebranding

Complete Transformation Results in Rapid Growth of Membership, CEO-Level Board Expansion and Strong Brand Value

WASHINGTON, D.C. – Marking one year since the Insured Retirement Institute (IRI) initiated its extensive and successful rebranding efforts from the old NAVA, the Institute is engaged in a widespread roll out of its Members Only Website to more than 30,000 financial professionals. The online portal – www.myIRIonline.org – offers IRI members exclusive access to the latest industry news, resources, FINRA-cleared, client-approved materials, discounted online continuing education credits, research and more.

Last month, IRI expanded its Board of Directors with the addition of six prominent leaders to its already strong Board. And over the course of the past 12 months, IRI has become the go-to source for members, non-members and the media as a trusted supplier of high-quality research, education and much more. IRI is the only association that represents the entire supply chain of insured retirement strategies, with membership spanning major insurers, banks, asset managers, broker-dealers and financial advisors.

“As IRI marks the one-year anniversary of our highly successful rebranding, there is little doubt that we are truly unique in serving the entire insured retirement income industry,” IRI President and CEO Cathy Weatherford said. “Over the course of the past year, IRI has embraced a new dynamic – championing the virtues of insured retirement strategies while delivering rich education and resources to advisors and consumers alike. While we have successfully helped reshape the debate on holistic retirement planning, the perilous state of Social Security and near disappearance of defined benefit plans necessitates that we redouble our efforts and outreach. By continuing to fulfill our mission, through engagement within the industry and with consumers, we will further position ourselves as the preeminent lifetime income organization.”

Over the past year, IRI’s message and efforts have spanned from Capitol Hill to Main Street – making measureable inroads with key regulators, Administration leaders and elected state officials, while informing consumers of the role insured retirement strategies can play in a holistic retirement plan. From working with the SEC to create and make available a variable annuity summary prospectus, to meeting with top Department of Treasury officials to discuss guaranteed lifetime income strategies, IRI’s successful advocacy has positively affected every corner of the industry.



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This past April, IRI led a coalition to help educate the 77 million Baby Boomers on the need for quality retirement planning during National Retirement Planning Week. In total, since May of 2009, IRI has successfully messaged the one-of-a-kind value proposition of insured retirement strategies to a unique audience of more than 130 million readers.

About the Insured Retirement Institute: The Insured Retirement Institute (IRI) is a not-for-profit organization and is the authoritative source of all things pertaining to annuities, insured retirement strategies and retirement planning. IRI exists to vigorously promote consumer confidence in the value and viability of insured retirement strategies, bringing together the interests of the industry, financial advisors and consumers under one umbrella. IRI's mission is to: encourage industry adherence to highest ethical principles; promote better understanding of the insured retirement value proposition; develop and promote best practice standards to improve value delivery; and to advocate before public policy makers on critical issues affecting insured retirement strategies. Visit www.IRIONline.org to experience the new, vast resources of the new Insured Retirement Institute for yourself.

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