



Practice Manual for Retirement Management Analyst (RMA) Certificate Holders and

François Gadenne

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This 2016 update of the RMA Practice Manual is the process introduction and glossary reference book to the RMA curriculum content of the Retirement Management Analyst (RMA) Designation. -RMA students use it during Week 1 of the RMA online education programs. -RMA graduates keep it as desktop reference. - Compliance officers use it as documentation for placing the RMA designation on their approved list. The RMA designation, created by the Retirement Income Industry Association (RIIA), is a rigorous educational and ethics training that focuses on building the retirement plan to mitigate risks across the household balance sheet and master the retirement-planning advisory process. Financial professionals who take and pass the examination to earn the RMA designation are uniquely prepared to deliver retirement-income solutions and services to clients who want a secure income stream and ongoing professional management throughout their retirement years. The focus of the education is on the Household Balance Sheet and Budget in order to “First Build a Floor, then Expose to Upside.” Most investment professionals specialize in managing client assets, with an eye toward maximizing accumulation during the clients’ working lives. The duties of Retirement Management Professionals, however, are broader. These advisors need to manage their clients’ assets, liabilities, and cash flows, with an eye toward minimizing a broad range of risks during their clients’ retirements. RIIA developed a hub-and-spoke framework to organize retirement-income solutions. The framework has seven chapters – a hub, five spokes and an integrative process. The client is the hub, and the spokes are the steps in a process of integration and monitoring. RIIA calls them “spokes” rather than “steps” for two reasons. First, they represent a cyclical process of interaction with the client that has no specific beginning or end. Secondly, each one strengthens a well-rounded relationship between advisor and client. Building a portfolio for retirement income isn’t necessarily harder than building a portfolio for asset accumulation, but it does require a deeper assessment of the client’s needs. The investment of more time at the beginning of the relationship can pay off, however, in the creation of satisfied clients whose assets will be “stickier” and who will also bring additional advisory opportunities.

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