2023

NTSA AWARDS STORIES

NTSA

National Tax-Deferred Savings Association

LETTER FROM EXECUTIVE DIRECTOR NATE GLASSEY

NTSA Members and Friends,

It has been a joy for our retirement industry to embrace change, dive in, and create opportunities throughout 2022. The recent passing of SECURE 2.0 is exciting as we expand coverage and encourage more to save for retirement. With change comes work, effort, and innovation.

As we reflect on everything that has taken place throughout the past couple of years, we note the strength and confidence of the many employees we work with in the public and non-profit sectors. They are very resilient as they mold leaders for the future, during a pandemic, with vast communication tools, and in the midst of many new decisions.

Those who serve these individuals, working together to enable their financial plans, are also very resilient and have adapted to new work environments with even more robust service models.

We recognize those who 'step up' to rise above those challenges and create unique, innovative solutions as they serve and support others inside the retirement industry and beyond. Our NTSA 2023 awardee role models continue to strive for excellence in all aspects of life and service.

Everyone involved in NTSA and ARA thanks you for your contributions as we honor your achievements and service.

Keep up the great work!

NATHAN J. GLASSEY, TGPC, QKA®, CRES®

NTSA
National Tax-Deferred Savings Association

ADVOCATE. EDUCATE. GROW.

The National Tax-Deferred Savings Association (NTSA) is the division of the American Retirement Association (ARA) that focuses on the needs of the tax-exempt and non-profit marketplace — as well as public educational institutions — by leading, advocating for, and educating their diverse, professional membership of financial advisors, consultants, administrators, and product creators and providers (all dedicated to meeting client needs). ARA's membership of more than 30,000 professionals is diverse but united by a common dedication to the employer-based retirement plan system.

Formed in 1989, NTSA is nationally recognized for its thought leadership and policy expertise. Its membership — more than 6,000 professionals — provides consulting and administrative services for ERISA non-profit, 403(b), and 457(b) plans covering millions of American public and private workers.

On the advocacy front, the NTSA mission is to work effectively and proactively with state and local governments to advance public and private tax-exempt and non-profit employee retirement security, based on the tenets of open access, ethical practices, and a universal standard of care.

NTSA represents its membership in state capitals across the country and in Washington, D.C. They promote public policy, address issues, and design retirement plans that improve employee outcomes. In addition, NTSA coordinates with ARA in its federal-level advocacy on behalf of its Divisions of Membership.

On the education front, the NTSA mission is to provide high quality, forward-thinking, and diverse education opportunities. This professional development — for and with plan sponsors, key decision makers, employees, and related parties — is focused on the needs of these target markets: K-14, higher education, healthcare, church, non-profit, 457(b), and Taft Hartley.

NTSA AWARDS

NTSA Awards demonstrate to the retirement industry and the community at large that NTSA members exemplify commitment to excellence and lifelong service in their field and spheres of influence. Honorees serve as ambassadors of NTSA values to their clients and their communities, highlighting the essence of the NTSA mission in action. The 2023 honorees' brief stories here enable us to learn and grow.

NTSA
BOB D. SCHILLER AWARD

The **BOB D. SCHILLER AWARD**, a lifetime recognition, honors individuals who have given freely of themselves, their time, and resources to NTSA and the retirement industry. Honorees have gone above and beyond expectations, making a difference for their clients and the industry. Named in memory of Bob D. Schiller — an enthusiastic NTSA supporter and mentor — this award is given at the NTSA President's discretion.

RICHARD FORD
VOLUNTEER SERVICE AWARDS
NTSA

The **RICHARD FORD VOLUNTEER SERVICE AWARDS** highlight lifetime service, honoring NTSA members who are role models for volunteerism with NTSA and their community. Richard Ford was a founding NTSA member; he exemplified NTSA values through his extraordinary contributions to NTSA and his community throughout his career. NTSA established the awards in his memory in 2019.

ELITE ADVISOR AWARDS

The **ELITE ADVISOR AWARDS** celebrate the best-of-the-best of NTSA member financial advisors. These awards focus on those who excel, advocate proactively, lead in profound ways, creatively operate an ever-improving practice, and mentor responsibly. The awardees' presence and innovative work shape best practices with outstanding and unique accomplishments. These awards were established in 2013.

ELEANOR "ELLIE" LOWDER
TGPC

(1938-2022)

For her lifetime of outstanding industry service, Ellie Lowder is posthumously presented with the NTSA 2023 Bob D. Schiller Award.

Ellie was much more than a colleague: she was a friend, mentor, and feisty independent woman who loved what she did, which played out well when communicating with the IRS. Ellie shared a love of the 403(b) industry and she was not shy about it.

Her volunteer work with NTSA goes back decades! Ellie began her career in the 403(b) annuity markets in 1961 and was regarded in the industry as an expert in her field. We used to joke with her that she sold the first TSA Annuity contract! Ellie was a member of the NTSA Government Affairs Committee and the NTSA Business Intelligence Committee. She also authored a number of widely-used 403(b) tax-sheltered annuity training manuals, taught hundreds of continuing-education-credit classes nationally, and wrote a number of articles for various trade magazines. A frequent speaker at the national meetings held by insurance companies, mutual fund companies, ASBO, NTSA, and other groups, her broad experience included sales, marketing, the technical aspects of the 403(b) market, and other retirement savings plans that are utilized by the employees of non-profit and public-education employers.

As co-author of *The Source* and *The Best Practices Manual*, Ellie was the voice behind "Ask Ellie" — the NTSA hotline for questions and answers — for many years. It was Ellie who was the major force behind getting the TGPC credential to the table. We are forever grateful for the commitment, energy, service, and strength that Ellie provided to our industry. It has been said perfectly, "We will miss her terribly, but I doubt whether any of us will forget her."

2023

RICHARD FORD

VOLUNTEER SERVICE AWARD

NTSA

SUSAN D. DIEHL
QPA, CPC, ERPA, TGPC, BCF™

PenServ Plan Services, Inc.
Horsham, PA

For decades, Sue Diehl has been an exemplary leader, both for NTSA and her community. Diehl's volunteerism has formed and improved NTSA excellence by leading its Government Affairs and Professional Education Committees and serving on their Awards, Summit, and Business Intelligence Committees. She also co-authors *The Source* and *The Best Practices Manual*. Diehl was honored with the NTSA 2012 Bob D. Schiller Award and has served as NTSA 2013 President. Her favorite work with NTSA is chairing the ARA Legislative Relations Committee, thereby making a difference for the entire retirement industry. Diehl's firm, PenServ Plan Services, is a NTSA Strategic Partner.

While being a transformational NTSA volunteer, Diehl and her family are deeply committed to community service in myriad ventures: Family Promise of Montco, PA (bridging homelessness and independence), Cardinal Opportunities high school mentor program, Operation Christmas Child (gifting internationally), and the Jesus Victory Garden (providing for the local food pantry). Sue received the 2013 Outstanding Citizen Award of Upper Dublin for her exemplary charitable service, volunteer work, and long-term community involvement.

With Family Promise of Montco, Diehl is the September Host Coordinator, coordinating the 120 volunteers who bring food, fellowship, transportation, counseling, virtual education assistance, and overnight shelter to their churches and synagogues, and to moms and kids in transition to housing.

"Sue knows how to get things done and works tirelessly for her community, our families, and our organization. She is the light at the end of a long day for many of our families and is someone who shows compassion, grace, and love to those who are often forgotten and dismissed by society," said Marsha A. Eichel, Executive Director of Family Promise of Montco, PA.

RICHARD FORD
VOLUNTEER SERVICE AWARD
NTSA

NTSA 2023 RICHARD FORD VOLUNTEER SERVICE AWARDS (FVSA) JUDGING COMMITTEE

The Awards Judging Committee for the Richard Ford Volunteer Service Awards themselves show significant NTSA volunteerism and personal commitment to NTSA and community service. The members include:

Chair:
TERESA WARD, CRPC®
Invesco, New York, NY

JIM KELLEHER, ERPA, CPFA™
Carruth Compliance Consulting, Inc., Tigard, OR

LISA STUBBS, CRES®
Security Benefit, Topeka, KS

KEVIN TWOHY
PlanMember, Carpinteria, CA

CHRISTINA WINTERS, AIF®
Lincoln Investment, Irving, TX

Of Advice:
KRISTINE J. COFFEY, CPC, CPFA™, CRES®
CPE Associates, Ltd., Pewaukee, WI

PREVIOUS FVSA HONOREES

DAVID BLASK, CPC, TGPC, AIF®, CRES®
Lincoln Investment, Fort Washington, PA (2020)

DONNA CALOIA, CRES®
Lincoln Investment, Palm Beach, FL (2020)

NATHAN GLASSEY, TGPC, QKA®, CRES®
formerly of National Benefit Services, West Jordan, UT (2022)

TAMARA L. INDIANER, CFP®, AIF®, CRES®
Lincoln investment, Waltham, MA

PHILIP KIM, CFP®, ChFC®, CLU®, RICP®, CRES®
Signature Wealth Concepts, Scottsdale, AZ, Equitable (2022)

ADAM PEARCE, CFP®, CRES®
Retirement Professionals, Phoenix, AZ, Lincoln Investment (2021)

KENT SCHUTTE, TGPC, CRES®, CLU®, ChFC®, CFP®
EFS Advisors, Cambridge, MN (2021)

LISA STUBBS, CRES®
Security Benefit, Topeka, KS (2020)

NTSA ELITE ADVISORS

NTSA MEMBER ELITE ADVISORS 2014 THROUGH 2022

S. BRUCE ALLEN, CRES®
Old Dominion Investments and Insurance, Winchester, VA; PlanMember (2014)

RANDY E. ARANOWITZ, CLU®, TGPC, CLTC®
Kades-Margolis, Lakewood Ranch, FL; US Kades-Margolis (2014)

MARTIN ARINAGA, ChFC®, CFP®
Chinen & Arinaga Financial, Mililani, HI; PlanMember (2016)

JOSEPH AVALLONE
Retirement Planning Associates, Winter Springs, FL; PlanMember (2020)

KATHRYN CAWLEY, CSA
The Voyager Group, Ltd., Joliet, IL; Lincoln Investment (2015)

MICHAEL CAYEN, CRC®
Cambridge Investments, Royal Oak, MI (2017)

JOSHUA R. DECKER, CFP®
EFS Advisors, St. Paul, MN; EFS Advisors (2016)

LOUIS DEPPAS
Lincoln Investment, Lakewood, NY; Lincoln Investment (2015)

JODY DETILLIER, ChFC®, RICP®, TGPC, LUTCF®, CLTC®, CPFA™, CRES®
Detillier Financial Advisors, LLC, Lutcher, LA; Lincoln Investment (2015)

CHARLES "SONNY" DETILLIER (retired)
Detillier Financial Advisors, LLC, Lutcher, LA; Lincoln Investment (2014)

RICHARD DOBSON, CFP®
American Financial Management, Ltd., Cedar Falls, IA (2014)

ALBERTO GAGLIANESE, CFP®, AIF®, CRES®
Clearpath Wealth Partners, LLC, Marlton, NJ; Lincoln Investment (2022)

CARLA-ANN E. GOEDTKE, CPFA™, CRES®, MRFC®, CSA®
Investors Choice Financial Services, Slayton, MN; American Portfolios (2022)

MICHAEL GOLDBERG, CRES®
Equitable Advisors, LLC, Southeast Complex, Boca Raton, FL; Equitable (2021)

SHANE HALL
Shane Hall Financial, Amarillo, TX; PlanMember (2018)

TOMMY HALL
Tax Sheltered Planning, Fayetteville, NC; GWN (2016)

VIRGINIA T. HARRIETT, CFP®, CRES®, AIF®
Harriet Financial Group, Marlton, NJ; Lincoln Investment (2022)

SCOTT HAYES, CFP®, TGPC, CPFA™
ISC Group, Inc, Dallas, TX (2017)

CHAD HUFFORD
Veritas Wealth Management, Anchorage, TX; PlanMember (2017)

GARY IMMINK
Williams & Company, Grandville, MI; PlanMember (2019)

STEWART JACOBSON, JD, CFP®
Dearborn & Creggs, Sugar Land, TX; Lincoln Investment (2017)

WAT KEYS, CFP®, CRPS®
CapTrust, Raleigh, NC (2019)

PHILIP KIM, CFP®, ChFC®, RICP®, CRES®
Signature Wealth Concepts, Scottsdale, AZ; Equitable (2016)

RANDAL LUPI, RPS
Equitable Advisors, LLC, Novelty, OH; Equitable (2019)

SARA E. MCGRATH, AIF®, CRES®
Clifford & Rano Associates, Inc., Worcester, MA; Lincoln Investment (2020)

FRANK R. OWEN, III, CLU®, ChFC®,
F.R. Owen and Associates, Charlotte, NC (2014)

ADAM PEARCE, CFP®, CRES®
Retirement Professionals, Phoenix, AZ; Lincoln Investment (2016)

SHANE ROBINSON
Robinson and Associates, Greenville, NC; Lincoln Investment (2021)

KENT SCHUTTE, CFP®, ChFC®, CLU®, TGPC, CRES®
EFS Advisors, Cambridge, MN; EFS Advisors (2018)

BRUCE SMITH (retired)
CalPro Network, San Diego, CA; PlanMember (2014)

JEFFREY J. SMITH (deceased)
Lombard, IL; Lincoln Investment (2014)

JILL SNYDER, TGPC
DSE Financial, Delafield, WI; GWN (2014)

LISA TURSI, AIF®, CRES®
Clifford & Rano Associates, Inc., Worchester, MA; Lincoln Investment (2021)

LYLE UYEDA
Chinen & Arinaga Financial, Mililani, HI; PlanMember (2015)

RICHARD E. WILLIAMS, CRS®
Williams & Company, Grandville, MI; PlanMember (2015)

CHRISTINA WINTERS, AIF®, BFA
Creating & Managing Wealth, LLC, Irving, TX; Lincoln Investment (2018)

DAVID WOLFE, CRES®
EFS Advisors, Minneapolis, MN; EFS Advisors (2020)

ROBERT YOUNG, CRES®
One-2-One Wealth Strategies, Scottsdale, AZ; PlanMember (2019)

2023 NTSA ELITE ADVISOR AWARDS

NTSA 2023 ELITE ADVISOR AWARDS HONORED NOMINEES

JOHN BANNAN, CRES®
ABMM Financial, Rockleigh, NJ

JERROLD BECK, AIF®; CRES®
KadesMargolis, Wayne, PA

SUZANNE HOLWAY CONRAN, CRC®, AIF®, CRES®
KAF Financial Advisors, LLC, Braintree, MA

JEFFREY C. FARRIS, CFP®
Dearborn & Creggs, Sugar Land, TX

LEE KROENING, CFP®
The Legend Group, Getzville, NY

KELLY A. LARKIN, CFP®
Kelly A. Larkin, Seattle, WA

MITCH MELAN
Melan Financial, Atlanta, GA

JOHN J. (JAY) MERRILL, CIMA®
Clifford & Rano Associates, Inc., Worcester, MA

JUSTIN C. MURO, CRES®
Muro Wealth Management, Lombard, IL

JENNIFER PROSISE, CFP®, CRES®
Voyager Group, Ltd., Joliet, IL

RIAN A. STEINBISS, AIF®, CRES®
Clearpath Wealth Partners, LLC, Marlton, NJ

SARA SCHOLL, CFP®, CRES®
Turning Pointe Financial, Basking Ridge, NJ

DONALD E. WADE, CFP®, CRES®
The Legend Group, Downers Grove, IL

NTSA ELITE ADVISOR AWARDS JUDGING PROCESS

Anonymity marks the awards' judging process, with all nominations, applications, and affirmations being fully redacted before the judges carefully consider, individually, the honored nominees' quantitative and qualitative submissions. Then together, the judges consult, collaborate, and come to consensus, facing the hard task of anonymously choosing the best of the best from their own extensive experience, expertise, and responsibility.

NTSA 2023 ELITE ADVISOR AWARDS JUDGING COMMITTEE

Chair:
JOHN ADZEMA, QPA, QKC, QKA®, TGPC
National Associates, Inc., Cleveland, OH

CARLA-ANN GOEDTKE, MRFC®, CPFA™, CSA®, 2022 EA
Investors Choice Financial Services, Inc., Slayton, MN

MICHAEL GOLDBERG, 2021 EA
Equitable, Boca Raton, FL

CHRISTOPHER JANEWAY, CPFA™
Fourth Point Wealth, PlanMember, Newport Beach, CA

LISA TURSI, CRES®, 2021 EA
Clifford Rano, Lincoln Investment, Worcester, MA

DAVID WOLFE, CRES®, 2020 EA
EFS Advisors, Coon Rapids, MN

Of Advice:
KRISTINE J. COFFEY, CPC, CPFA™, CRES®
CPE Associates, Ltd., Pewaukee, WI

2023 NTSA ELITE ADVISOR AWARDS

KELLY LARKIN

CFP®

Kelly A. Larkin
Seattle, WA

RETIREMENT ASSETS UNDER ADVISEMENT: $134,576,685
PARTICIPANTS SERVED: 586
SCHOOL DISTRICTS SERVED: 7

"I have known and respected Kelly Larkin for over 20 years. She has a very successful career and loves helping clients reach their goals. Kelly and I share ideas on a regular basis (over 2500 miles) and my long-term relationship with her has made me a better advisor." — From an Elite Advisor referral

"Kelly has successfully enabled many educators in the 403(b) sector to retire well. At the same time, she helped several school districts by educating their staff with regulations, standards, and best practices information on the 403(b) industry. From Rookie of the Year to the President's Award, Kelly is recognized for her people skills and understanding of the financial planning industry." — From her supervisor

"Kelly has been helping clients with their investment needs and goals since 1997. Her goal is to develop long-term relationships with her clients by designing, implementing, and monitoring customized financial programs for them. By working closely with her clients, she is best able to design a plan that helps meet their unique and individual needs. Kelly has invested in her growth through advanced formal education, practical work with industry professionals and a practice management coach." — From her nominator

In Kelly's words, "I have been able to 'pay it forward' by mentoring young advisors and hope that my help feels as meaningful to them as the mentorship of others has been to me."

An Elite Advisor looks beyond the here and now, the next contract, and the next day. An Elite Advisor sees the big picture and ensures their actions influence the growth of the industry and their clients' well-being, far into the future with conscientiousness and diligence.

MITCH MELAN

Melan Financial
Dunwoody, GA

2023 NTSA ELITE ADVISOR AWARDS

RETIREMENT ASSETS UNDER ADVISEMENT: $250,000,000
PARTICIPANTS SERVED: 3400
SCHOOL DISTRICTS SERVED: 5

After 27 years, "Mitch is a pro's pro, with a deep belief in the power of financial advice. He relishes helping people save as he is relentless in the pursuit of excellence. Clients respond. Recently, he held a weekday thank-you lunch to educate his clients about these volatile markets; over 250 showed up at an Atlanta hotel. That's unheard of. He spent personal money to give back to his clients. That's the best example I can give you of how much his clients appreciate him. His clients respect him and value his advice, and it's warranted. Mitch is a great advisor and he has a tremendous business that he built with years of hard work." — Commented supervising party

"Both my parents were educators. Watching what they did and how they lived gives me unique insight into working with this target niche. With COVID, my open office is even more essential as is increased technology use, e.g., e-signatures, video conferencing, my 24/7 access website, e-newsletter, and market update links. I've written a book with an audio option to share best practices. My system of gift cards, calls, flowers, and holiday treats set me apart."

"... He is very active in his community, often engaging with middle and high schoolers on the importance of financial literacy and investing ... He is not just an elite financial advisor, but also a father, husband, author, and community activist." — Per an affirmation

Elite Advisors take a step back from their retirement focus and evaluate the gaps in their clients' financial wellness, they also take a moment to reflect on their own services. That includes understanding how small changes in their practices can improve the lives of their clients.

2023 NTSA ELITE ADVISOR AWARDS

JENNIFER PROSISE

CFP®, CRES®

The Voyager Group, Ltd.
Joliet, IL

RETIREMENT ASSETS UNDER ADVISEMENT: $50,524,705
PARTICIPANTS SERVED: 804
SCHOOL DISTRICTS SERVED: 50

"Jennifer has over 15 years of experience. She is a community-involved professional who actively participates in the retirement plan space, helping clients feel confident for retirement. She helps all sectors and has the heart for the non-profit and public-school 403(b) spaces. Further, she educated school business officials — through regional and state ASBO meetings — on the benefits of the CRES program and providing financial literacy education." — Per her nominator

"Jennifer truly cares about her clients and puts their interests above hers. She is constantly learning about new things. This year, she became an expert on student loan forgiveness and has helped numerous individuals save thousands of dollars. She is very involved in community affairs, taking leadership roles. She also serves on the NTSA Summit planning committee." — Added her supervisor

In Jennifer's words, "What started out as a 'just sign a teacher up for $25/pay' has turned into 'how do we plan your retirement for you, your spouse, and your children, and how can we make this money last generationally?'" 'What you bring to the table is why they work with you.' The legacy that I am leaving behind is that this is not a sales job, and it is not a relationship management job. We are here to help people. I'm also leaving behind a legacy of partnership. They are not clients, but friends."

An Elite Advisor understands the need to push for a better future for their clients and advocates on their behalf. Whether that advocacy is local, regional, or national, an Elite Advisor can identify a concern in the community and energetically work to find or encourage a solution.

2023 NTSA ELITE ADVISOR AWARDS

RIAN STEINBISS

AIF®, CRES®

Clearpath Wealth Partners, LLC
Marlton, NJ

RETIREMENT ASSETS UNDER ADVISEMENT: $100,000,000 +
PARTICIPANTS SERVED: 1000+
SCHOOL DISTRICTS SERVED: 20+

"Rian's accomplishments are a testament to her hard work and dedication. Starting at 18, as a full-time Sales Assistant and Rutgers student, she has risen to be known by the districts as a leader and senior Hall of Fame financial advisor as she also mentors junior advisors and interns. After 3 years, she interviewed other advisors to see who could be the best trainer for her. After that, she never looked back." — Per her nominator

"I was drawn to this financial advisor career so I could help people realize their financial goals." Rian has maintained a sense of community through charitable endeavors, client education, business networking, and teaching financial literacy with Jr. Achievement. Also, she earned local ASBO representation with advisor professionalism and being a trusted knowledge source. From the experience of 'having raised myself and siblings from a young age,' she established scholarship programs to promote academic excellence.

"I am now in a position to mentor and empower other young female advisors. My goal is to show them how to grow their businesses by building strong relationships and having a great work/life balance."

"Rian is active with Women's Impact Network and the ARA Third Thursday committee of its Council for Women, sitting on live panels, being accessible and offering coaching. She has also created a successful framework for the next generation to succeed, implementing the process presently."

An Elite Advisor mentors responsibly and is constantly looking for ways to give back and encourage others in this space. They understand the support they have received from those in the past and look to better the industry with their mentorship and volunteerism.

DONALD E. WADE

CRES®, CFP®

The Legend Group
Lombard, IL

2023 NTSA ELITE ADVISOR AWARDS

RETIREMENT ASSETS UNDER ADVISEMENT: $112,000,000
PARTICIPANTS SERVED: 753
SCHOOL DISTRICTS SERVED: 25 - 30

As a 42-year veteran of the industry, Don Wade is no stranger to its changes and opportunities, having quite diverse, vast, and successful experiences with school districts, hospitals, colleges, and non-profits in the Midwest and California. Don became active with NTSA in 1990, served 3 years on the Leadership Council and as President in 1998. Recently, he initiated an Illinois CRES consortium with Lincoln and OMNI advisors.

Don's driving "focus is to help people. People will gravitate toward knowledge and honesty. If we do that to the best of our ability, the business will take care of itself." Said a Plan Sponsor, "... true professional ... provides employees clear concise direction ... understands their interests ... takes time and respects ... financial advisory skills exemplary."

"Consummate professional ... caring relationship with clients ... thorough and creative ... always willing to share," said his business partner. "Don is a trusted source of information when I have questions, and he's made our branch office a more productive workplace." Now Don is also passing on his philosophies to a junior advisor who has a degree in financial planning, bringing him to the Summit and making sure he is CRES certified. "About 8 years ago, I noticed a shift as most of my time was now being spent on ensuring that my clients have enough income until 95," observed Don, always growing and sharing wisdom.

An Elite Advisor is a leader who understands that information is a commodity best shared. Taking time for each individual employee and client requires respect, attention and care. Elite Advisors invest time in the breadth of the industry's information, shared with empathy and seasoned acumen.

NTSA expresses its gratitude to its Strategic Partners, whose support is key to the accomplishment of our mission and to serving our members, our industry and ultimately the plan participants and their dependents and beneficiaries.

NATIONAL TAX-DEFERRED SAVINGS ASSOCIATION

4401 North Fairfax Drive
Suite 600
Arlington, VA 22203

703.516.9300
customercare@ntsa.org
ntsa-net.org

AMERICAN RETIREMENT ASSOCIATION

4401 North Fairfax Drive
Suite 600
Arlington, VA 22203

703.516.9300
info@usaretirement.org
usaretirement.org