2024 Research and Events Calendar

retirement leadership forum

Events Calendar

DCIO Executive Forum
Date: March 13-14, 2024

RK* Participant Engagement Virtual Roundtable
Date: April 2024

RK RM Executive Virtual Council
Dates: May 22, 2024
Q4 2024

RK Sales Executive Virtual Council
Date: June 11, 2024

DCIO Virtual Roundtable
Date: August 2024

DCIO and RK Sales Executive Forum
Date: Q4 2024

For more information, please email events@retirementlf.com.
*Recordkeeper

Featured Resource: RLF's Advisor Insight

Advisors play a critical role to the success of our DCIO and recordkeeping members, one that's increased amid their rapid consolidation and a shift to a more participant-focused business model. Since our founding in 2017, we've added significantly to our resources aimed at helping our members better understand the advisor landscape, including:

- Aggregator and broker-dealer firm profiles, updated regularly, provide an easy-to-access tool to keep your teams up to date on critical developments at these firms
- Insights from our annual surveys of and roundtable events for leadership at top aggregator and broker-dealer firms.
- A new partnership with the ARA, the NAPA Advisor Research Institute (NARI). Beginning in 2024, NARI's semi-annual surveys will provide unprecedented insight into the businesses of top retirement advisors

Research Initiatives

First Half

- Kicking Off 2024: Key Retirement Trends and Topics
- Annual DCIO Best Practices and Benchmarking Report
- Leveraging Data and AI to Drive Participant Engagement
- Plan Sales Benchmark and Virtual Event Report Out
- Plan Relationship Management Benchmark and Virtual Event Report Out
- Retirement Income: Update on New Products and Their Utilization
- Updated Aggregator Profiles
- Updated Broker/Dealer Profiles

Second Half

- Key Insights from Scaled Retirement Advisory Firms (SRAFs)
- DCIO Virtual Event Report Out
- The Real Impact of Group Plans Report
- Plan Sales Benchmark and Event Report Out
- Plan Relationship Management Benchmark and Virtual Event Report Out

Overview of Member Services

The Retirement Leadership Forum is a membership-based research network that serves the needs of top retirement plan **recordkeeping**, **investment only**, and **retirement advisory firms**. Through an all-inclusive, annual fee, we provide the following services to help our members make quicker, more confident decisions:

Best Practice Research

Through our proprietary research process, we deliver insight into the challenges facing industry-leading firms and share best practice case studies of innovative solutions.

Meetings & Networking

Join senior retirement leaders to hear and discuss the findings from our research. Peer-to-peer interaction and research-backed insights make our events different from the typical conference.

Custom Advisory Services

Sometimes you need answers right away. Our ad hoc, customized support gives you answers to your urgent questions through surveys of your peers, data searches, or customized presentations.

> "Thank you so much for designing and administering a survey of the membership for us. Really appreciate your responsiveness and professionalism, as well as working within the confines of our tight timeline — the process went very smoothly throughout."
>
> – A Top 10 Asset Manager

> "RLF has been such a wonderful partner and the support you provide feels so differentiated. Consistently, the organization trusts your insights and looks to you as a key and reputable source."
>
> – A Top 10 Recordkeeper

For more information, please visit our website, email us, or follow us on LinkedIn.

Recent Publications

Industry Trends and Hot Topics

- Kicking Off 2023: Cautious Optimism amid Economic Uncertainty
- Kicking Off 2022: The Industry Succeeds amid Uncertainty
- Kicking Off 2021: The Retirement Industry Moves Forward from a Pandemic

The Participant Experience

- Participant Engagement in 2023: Driving Action and Measuring Impact
- 2022 Recordkeepers' Spanish Language Capabilities
- Rollover Unit Strategy and Structure
- Participant Engagement in 2022: Harnessing the Power of Data and Technology to Drive Better Outcomes
- 2021 Recordkeepers' Spanish Language Capabilities

Plan Sponsor Sales and Service

- Recordkeeper RM Executive Council Large Market (More than $50M) Q4 2023 Virtual Roundtable
- Recordkeeper RM Executive Council: Small Market (Less than $50M) Q4 2023 Virtual Roundtable
- DC Sales Update — Q4 2023 Large Market
- DC Sales Update — Q4 2023 Small MarketRecordkeepers' Sales Incentive Trip Practices
- 2023 Q2 Large Market Recordkeeper RM Executive Virtual Council
- 2023 Q2 Small Market Recordkeeper RM Executive Virtual Council
- 2023 Q2 Large Market Recordkeeping Sales Update
- 2023 Q2 Small Market Recordkeeping Sales Update
- Q4 2022 Large Market Recordkeeping Sales Update
- Q4 2022 Small Market Recordkeeping Sales Update
- 2022 Q2 Recordkeeper RM Executive Virtual Council
- 2022 Q2 Recordkeeper Sales Executive Virtual Council
- Plan Pricing and Profitability Practices
- Building the Post-Pandemic Relationship Management Strategy
- 2021 Q4 Recordkeeper Sales Executive Virtual Council
- Communicating with Clients about Cybersecurity
- Shaping the Post-Pandemic Service Model
- 2021 Q2 Recordkeeper Sales Executive Virtual Council
- Planning Beyond the Pandemic
- 2021 Q1 Recordkeeper Sales Executive Virtual Council

Recordkeeping Platform

- Recordkeepers' Participant Data Usage
- Recordkeepers' Participant Withdrawal Capabilities
- Recordkeeper Policies for Participant Data Access
- Recordkeeping Partnerships with HCM/Payroll Providers
- Recordkeepers' SOC-2 Compliance

Retirement Income

- Rethinking In-Plan Retirement Income

Investment Only

- DCIO Relationship Pricing Practices
- A More Refined Approach: DCIO Virtual Forum
- 2023 DCIO Organizational Profiles
- Asset Managers' Coverage of Institutional Consultants
- A Higher Stakes DCIO Business: Making More Strategic Partnership and Product Bets
- CIT Minimums and Breakpoints
- 2022 Aggregator Profiles: DCIO National Account Managers' Perspectives on the Firms They Cover
- A Narrowing Focus: Q3 DCIO Virtual Forum
- 2022 DCIO Organizational Profiles
- 2021 Aggregator Profiles: DCIO National Account Managers' Perspectives on the Firms They Cover
- A Whole New Frontier: How "Packaged Products" Are Changing the DCIO Landscape
- DCIO Fixed Income Assets
- A Path Back to Normal
- DCIO Travel Policies

Advisors and Aggregators

- 2023 Broker-Dealer Firm Profiles: DCIO National Account Managers' Perspectives on the Firms They Cover
- 2021 Scaled Retirement and Wealth Advisory Firm Roundtable

To see all of our research, please click here. If you have any issues with your website login, please contact us at info@retirementlf.com.