

For Immediate Release

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THE RETIREMENT ADVISOR UNIVERSITY (TRAU) AND THE DEFINED CONTRIBUTION
INSTITUTIONAL INVESTMENT ASSOCIATION (DCIIA) ANNOUNCE
TRAINING AND EDUCATION PARTNERSHIP

*Program Will Leverage TRAU's Ongoing Collaboration with UCLA's Anderson School of Management
Executive Education to Create Institutional Certified 401(k) Professional Designation*

JUPITER, FL and WASHINGTON, DC (June 1, 2020) – The Retirement Advisor University (TRAU) is pleased to announce a training and education partnership with the Defined Contribution Institutional Investment Association (DCIIA), the leading industry association for institutional investment consultants and advisors, investment managers, law firms, record keepers, insurance companies, and other providers in the institutional retirement savings system. Leveraging an ongoing collaboration with UCLA's Anderson School of Management Executive Education to deliver the C(k)P [Certified 401(k) Professional] designation, TRAU will create the iC(k)P [Institutional Certified 401(k) Professional] designation in partnership with DCIIA.

Along with three days of access to UCLA professors on campus in Westwood, Calif., iC(k)P candidates will study remotely through TRAU's 54 online courses, which TRAU and DCIIA will augment for the institutional market. In addition to consultants and providers, the iC(k)P program will be offered to the institutional market defined contribution plan sponsors that participate in DCIIA.

Topics covered in the campus and online training include:

- Behavioral decision making
- Fiduciary duties and broader ERISA understanding
- Marketplace dynamics and strategic planning
- Investments
- Plan design
- Financial wellness
- Education and advice
- Leadership
- Forensic accounting

“TRAU’s C(k)P designation has been recognized as the most rigorous for retirement plan advisors and DC industry professionals and the only one in collaboration with a major university,” noted Fred Barstein, TRAU’s CEO. “After establishing a partnership with SPARK to deliver online certification in 2019, we are pleased to partner with DCIIA to offer this new designation to their members and the institutional DC industry.”

Lew Minsky, DCIIA’s President and CEO, stated, “We partnered with TRAU to provide education and training to our members because of TRAU’s resources, reputation and academic collaboration with UCLA. Through our collaboration with TRAU, DCIIA is looking to expand our outreach to the RPA market in order to make our resources more broadly available to advisors and their clients as well as learn from them.”

The iC(k)P training is scheduled to launch November 11-13, 2020 at UCLA.

ABOUT TRAU

TRAU and its affiliate TPSU (The Plan Sponsor University) are leading online and in-person educators of DC advisors, plan sponsors and industry professionals. The C(k)P (Certified 401(k) Professional) designation, a collaboration with UCLA Anderson School of Management Executive Education, is the highest-level designation in the DC industry. There are almost 1,000 current C(k)P’s, mostly plan advisors but also many professionals from DC providers. Since 2013, TPSU has trained almost 10,000 plan sponsors who have attended almost 500 half-day training programs around the country. TRAU affiliate 401kTV enjoys over 50,000 industry subscribers.

ABOUT DCIIA

Founded in 2010, the Defined Contribution Institutional Investment Association (DCIIA) is a non-profit association dedicated to enhancing the retirement security of America’s workers. To do this, DCIIA fosters a dialogue among the leaders of the defined contribution community who are passionate about improving defined contribution outcomes. DCIIA’s diverse group of members include investment managers, consultants and advisors, law firms, record keepers, insurance companies, plan sponsors and other thought leaders who are collectively committed to the best interests of plan participants. For more information, visit: www.dciia.org.

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