



# Join the Voice of the Self-Directed Retirement Plan Industry **BECOME A RITA MEMBER**

**RITA membership will provide you with the resources you need to move your company forward.**

Founded in 1987, RITA is dedicated to the expansion of opportunities for all Americans to save and invest for retirement. We exist to be the leading educator and advocate for the growth and guidelines of the self-directed retirement plan industry by providing resources, information, communication, and support to both our members and consumers.



*"Being a member of RITA allows me to stay informed about events that directly affect our industry, as well as have the opportunity to network with other professionals who face the same challenges that I do."*

**- Kaaren Hall, uDirect IRA Services VISIT RITAUS.ORG**

## **MEMBERSHIP BENEFITS**

- Industry updates, alerts, and breaking news on regulatory, compliance, and other timely issues.
- Exclusive access to industry guidelines.
- Opportunity to join RITA committees, including Compliance, Operations, and Legislative Relations.
- Discounted rates to semi-annual conferences.
- Access to members-only networking sessions at RITA Conferences.
- Company listing in RITA's online Membership Directory, linking to your company website.
- Discounted RITA Institute rates for furthering education and professional development.
- Exclusive access to valuable resources in the members-only section of the website.
- Use of the RITA designated membership credential for the appropriate member category.

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## EDUCATION & CERTIFICATION



### INDUSTRY CONFERENCES

RITA conducts two industry conferences per year where top experts and key influencers speak about timely topics in the self-directed retirement plan industry. Members receive discounted rates as well as the opportunity to participate in members-only sessions to share industry issues, strategies, and solutions.



### WEBINARS

RITA members receive exclusive access to webinars addressing prominent and relevant issues in the self-directed retirement plan industry.

### ADVOCACY

RITA representatives hold regular meetings with influential government officials and policymakers from the Department of Treasury, Senate Finance, House Ways and Means, Department of Labor, Internal Revenue Service, and others to ensure our voice is heard and to affect positive results for retirement savers, investors, and the industry as a whole.

### MEMBERS INCLUDE

- Trust Companies
- Banks
- Third-Party Administrators
- Attorneys
- CPAs
- Real Estate Professionals
- Ancillary Service Providers



### IRA ADVANCED INSTITUTES

These advanced self-directed IRA classes are the only one of their kind in the industry. This 3-day class occurs twice a year and prepares students to earn their Self-Directed Industry Professional (SDIP) Certification



### SDIP CERTIFICATION

The RITA Self-Directed Industry Professional (SDIP) Certification is the professional credential for self-directed IRA professionals looking to bolster their knowledge and expertise.

## RITA MEMBERSHIP VALUE ADDS

- An industry forum to educate members on guidelines for exceptional administration of self-directed retirement plans holding alternative assets.
- Unrivaled education and interactive training sessions via the IRA Institute.
- Exclusive access to the Self-Directed Industry Professional (SDIP) Certification.
- Dynamic conferences held twice a year with industry experts carefully selected to share the newest industry knowledge and insights.
- Advocacy for regulatory and legislative concerns that impact its members and the industry.

### Questions?

Contact Our  
Membership Director:

**Mike Posey**  
(512) 826-5553  
[mposey@rita.us.org](mailto:mposey@rita.us.org)

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