



NEWS RELEASE

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FOR IMMEDIATE RELEASE

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Kravitz Launches New Cash Balance Certification Program

Cash Balance Consultant (CBC) certification program starts April 9th.

(Encino, CA) – Kravitz, the nation’s leading expert in the design and administration of Cash Balance Pension Plans announced today that they have developed a Cash Balance Consultant (CBC) certification program that will be offered quarterly beginning April, July and October. The first session is scheduled to begin April 9th.

Four online components will be involved in the certification program:

- Cash Balance 101: Live Webcast
- Cash Balance 201: Podcast
- Cash Balance Investments: Live Webcast
- Cash Balance Marketing: Live Webcast

An exam will be administered after the final session and certificates for Cash Balance Consultants (CBC) presented to those who pass.

Kravitz established the Cash Balance Consultant certification program to help retirement focused professionals understand how to sell and market Cash Balance Plans. . . *“Kravitz is able to take a wealth of practical, working knowledge we’ve amassed over the years, as well as the in-depth proprietary research we’ve conducted, and combine that with on-going support tools to create a unique educational program ,”* stated Dan Kravitz, president, Kravitz.

Resources available to Cash Balance Consultants will include:

- Videos for Advisors, Clients and Prospects
- Co-branded Written Materials
- Speaker Program Support
- Targeted Direct Marketing

- Co-authored Article for a Journal/Newspaper

Kravitz designed its first Cash Balance Plan in 1989 and since then has become nationally known and recognized as a pioneer and leader in Cash Balance Plan design.

The cost for the program is \$199. Registration for the April 9th session is open. To register, or for more information, please send an e-mail to seminar@kravitzinc.com.

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Kravitz, Inc. is not licensed by the State of California or the United States Department of Education or accredited through any other agency as a learning institution. The Cash Balance Consultant certification and CBC designation is provided solely and exclusively by Kravitz, Inc. Kravitz, Inc. does not act as an employment agency and cannot give any assurance that the Cash Balance Consultant (CBC) certification and designation will be recognized by other persons or entities or provide its holders with employment opportunities or salary increases.

About Kravitz:

Since its founding in 1977, Kravitz has brought its clients the latest in design, administration, and management of corporate retirement plans. Kravitz is the largest independent firm of its kind in California with over 65 employees, including 7 actuaries and 25 other highly trained and credentialed professionals. Kravitz designed its first Cash Balance Plan in 1989 and since then has become nationally known and recognized as a pioneer and leader in Cash Balance Plan design. For more information, please go to www.cashbalancedesign.com.

Kravitz is the marketing name for the businesses of Kravitz, Inc. and Kravitz Investment Services, Inc. Kravitz, Inc. provides actuarial and consulting advice on the design and administration of retirement plans. Kravitz Investment Services, Inc. is a registered investment advisory firm that provides investment advice and asset management.