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Nearly 100 Retirement Plan Professionals Complete the Kravitz Cash Balance Consultant (CBC) Program

Next Cash Balance Consultant (CBC) certification program begins October 1st

(Encino, CA) – Kravitz, the national leader in design and administration of Cash Balance Retirement Plans, announced today that 87 advisors, TPAs and wholesalers have successfully completed the nation’s first Cash Balance Consultant (CBC) certification program.

This innovative educational program teaches retirement professionals how to market and sell Cash Balance Plans. Recent legislative changes and the desire to accelerate retirement savings have generated higher demand for Cash Balance Plans, which allow employers to make large tax-deferred contributions. As an established Cash Balance specialist, Kravitz provides web-based training for industry professionals interested in understanding how these complex plans work.

“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 ongoing support tools to create a unique educational program,” stated Dan Kravitz, the firm’s president.

The Cash Balance Certification program launched in April 2009, and begins its third session on October 1. Four live interactive webcasts cover topics including Cash Balance plan design, administration, investment strategies, and marketing.

After passing a final exam, participants receive a Cash Balance Consultant (CBC) certificate. Ongoing coaching and support helps them build a Cash Balance business, using extensive marketing tools and resources proprietary to the Kravitz Cash Balance Coach program.

“The ability to go in and talk intelligently about Cash Balance Plans is a huge differentiator for me,” said Donald Musnicki, a New York-based wealth management consultant who earned his CBC certification in July and sold his first Cash Balance Plan this month. He added, “Cash

Balance Coach is an excellent resource, and I feel confident having the resources of Kravitz behind me. I know this can make a big difference in retirement savings for many clients.” The cost for CBC certification is \$199. To register for the October 1st session, e-mail CBCoach@KravitzInc.com or call 818-379-6181.

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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.