



**CONVERGENT  
RETIREMENT PLAN SOLUTIONS, LLC**

## **For Immediate Release**

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### **Convergent Retirement Plan Solutions, LLC, launches interactive, online retirement education and planning resource for near retirees.**

Brainerd, MN – January 15, 2009 - Convergent Retirement Plan Solutions, LLC announced today the launch of “Learning to Retire,” an interactive, on-line learning application designed to help educate near-retirees about the myriad decisions they will face as they prepare for the transition into retirement.

According to Loni Porta, Convergent’s director of education, “As a society, we’re entering a completely new era of retirement—one in which individuals have far more choice and far greater personal responsibility than they have had in the past. While this new retirement era holds tremendous promise for many Americans, it also presents challenges for those near-retirees who are striving to make informed choices about their futures.”

Convergent’s web-based Learning to Retire application, which combines education with engaging, real-life interactions and examples, is designed to reduce the confusion and stress often associated with planning for the transition into retirement: confusion and stress that so often cause individuals to avoid planning altogether. “We wanted to create something completely new” says Porta “something accessible and fun that would help near-retirees gain confidence, a sense of control over their destinies, and something that would prompt action.”

Connie Spaulding, director of business development for Convergent, stresses that “Learning to Retire is not a do-it-yourself program that will take the place of financial professionals. Rather, it’s a value-added tool that will help near-retirees better appreciate the value of professional financial assistance and the potential role advisors and planners can play in helping them create a transition strategy.” Spaulding adds “Ultimately, Learning to Retire will help both financial organizations and advisors differentiate themselves in a crowded, “me too” market.

Learning to Retire, which can be fully branded and customized to reflect each provider's unique value proposition, includes education on a wide range of retirement transition topics, both financial and nonfinancial. In addition to the interactive learning portion of the application, Learning to Retire incorporates a retirement readiness quiz with dynamic user feedback and a resource portal with links to various federal and nonprofit web destinations near-retirees may visit for further information.

### **About Convergent Retirement Plan Solutions**

Convergent Retirement Plan Solutions, LLC, is a boutique retirement services company staffed with seasoned industry veterans dedicated to creating tailored compliance, education and business development solutions for the retirement services industry. Convergent's solutions produce measurable bottom-line results for institutional clients through decreased compliance exposure and increased acquisition and retention of retirement plan assets. Visit us at [www.convergentrps.com](http://www.convergentrps.com).

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