



INTEGRATED  
RETIREMENT  
INITIATIVES, LLC

## **PRESS RELEASE**

### **FOR IMMEDIATE RELEASE**

#### **TWO INDUSTRY VETERANS JOIN INTEGRATED RETIREMENT INITIATIVES**

Brainerd, MN, February 17, 2010 - Integrated Retirement Initiatives, LLC (IRI), a leading provider of integrated solutions for retirement business development and compliance support for financial organizations, today announced the addition of two industry veterans to its team of retirement experts.

John Paul Ruiz and Gordy Lusian recently joined IRI's team of retirement industry experts. The consultants on IRI's team, anchored by Mike O'Brien and Pam O'Rourke, average more than twenty years of industry experience in the retirement and financial services industry.

John Paul Ruiz has joined IRI as Vice President - Professional Development Services. Mr. Ruiz has more than twenty years experience as a consultant and trainer in the retirement and financial services industry. Drawing on his extensive industry experience in training both sales distribution channels and in-house compliance staff, Mr. Ruiz will be focusing on the design and delivery of a broad array of training and professional development services for retirement professionals. Prior to joining IRI, Ruiz served as the Director of Resource Development for the Retirement Products & Solutions division of Ascensus (formerly BISYS Retirement Services). Prior to Ascensus, Ruiz served as a relationship manager for several key alliance partners in the recordkeeping division of Universal Pension, Inc. (UPI).

Gordy Lusian has joined IRI as a senior consultant in IRI's Business Development Call Center. Mr. Lusian will be providing ERISA technical guidance and business development support to financial advisers and in-house compliance personnel. Mr. Lusian has more than twenty-five years experience as a consultant and trainer in the retirement and financial services industry. Prior to joining IRI, Mr. Lusian was a senior consultant with Ascensus where he was responsible for providing advanced sales call center support and training to advisers and other retirement professionals.

IRI Executive Vice President Thomas G. Anderson stated, "In today's ever-changing retirement plans marketplace, retirement professionals need a resource they can rely on for real-time answers to technical questions, insights into industry trends, and ongoing education. The industry veterans on IRI's team have become known for delivering practical, real-world compliance solutions as well as training solutions that focus on helping retirement professionals capitalize on regulatory and legislative changes. With these two strategic hires, John Paul and Gordy, IRI believes its deep retirement plans expertise is second to none in the retirement industry."

## **ABOUT IRI**

IRI is a leading provider of integrated retirement business development and compliance solutions for financial organizations that offer qualified plan, 403(b), 457, IRA, and HSA products and services. IRI offers a business development call center, outsourced compliance support, business development collateral material and strategic planning and market positioning consultation. For more information about IRI, visit [www.iri-llc.com](http://www.iri-llc.com) or call 877-731-9916.

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