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DALBAR and RLC Announce Joint Venture i-LearnERISA.com to Provide Online Learning for Changing ERISA Landscape

(February 18, 2021 Marlborough, MA) Concurrently with the go-live date of the Department of Labor's (DOL's) *"Improving Investment Advice for Workers and Retirees Prohibited Transaction Exemption 2020-02"* ("PTE 2020-02"), DALBAR, Inc. and the Retirement Learning Center have joined forces to provide on-demand, state-of-the-art solutions to help financial professionals easily comply with the new regulations. As the peak of rollover activity approaches for this immense market [i-LearnERISA](#) provides continuing education ("CE") for financial professionals who must act appropriately under PTE 2020-02 and Securities and Exchange Commission (SEC) rules.

Through the [i-LearnERISA.com](#) online platform, financial institutions and large numbers of advisors can learn the most current rollover rules and regulations by attending remote standard or customized interactive, audiovisual courses that facilitate social distancing. The first [i-LearnERISA](#) program responds to PTE 2020-02 with *"Navigating the New Rollover Reality"* and *"Compliance for Rollover Fiduciaries"* courses. **These CE courses are complimentary for candidates who register by February 28, 2021.** Both courses are scheduled for release on March 15, 2021 and will include the latest available regulatory information. Additional services and tools are also available through Retirement Learning Center's [Rollover Subscription](#) for an additional fee.

John Carl, president of RLC commented that Rollover rules are constantly changing in light of DOL and SEC guidance. Knowing the steps to uncovering plan distribution options; recognizing four common rollover scenarios; and implementing a systematic process for repeating compliant rollovers benefit your clients and limit liability for advisors and their firms. We are elated to join with DALBAR to provide industry standard compliance certification with scalable, practical and tactical practice management. Our goal is to educate and equip advisors so they may confidently instruct and advise plan participants as the "go to" advisor for that organization's benefit offerings; and roll over assets where and when appropriate in a compliant manner.

The [i-LearnERISA](#) courses address the unintended consequence ("Catch 20-2") that exposes institutions and practitioners in the rollover business to potential violations of ERISA as described in the paper ["Rollover Catch 20-2"](#) that is available at no charge.

Start now by taking the [One Minute Fiduciary Test](#) to see if your current practices are affected by PTE 2020-02.

Lou Harvey, President of DALBAR pointed out that "PTE 2020-02 is a vivid example of the need to rapidly implement new practices for a large number of professionals in a short time. Billions of dollars of rollovers are occurring daily so every day that passes means lost opportunities. I-LearnERISA makes the extensive knowledge available immediately to all."

[DALBAR, Inc.](#) is the financial community's leading independent expert for evaluating, auditing and rating business practices, customer performance, product quality and service. Launched in 1976, DALBAR has earned the recognition for consistent and unbiased evaluations of investment companies, registered investment advisers, insurance companies, broker/dealers, retirement plan providers and financial professionals. DALBAR awards are recognized as marks of a superior standard of care in the financial community.

[The Retirement Learning Center \(RLC\)](#) offers business building ERISA and IRA consulting services to the financial services industry. With over 180 years of combined retirement industry experience among their team of consultants, the depth and breadth of knowledge has helped over 43,000 financial professionals provide expert guidance to their private wealth management and institutional clients through case consultation and education.

RLC through their subscription service, [RLC Direct](#), provides answers to the most complex ERISA cases and translates rules governing the retirement industry into sales ideas and strategies that help financial professionals better serve their clients, grow their business and increase productivity.