



# 501(c)(3) Tax-Exempt Status Granted to the Society for Annuity Facts and Education (SAFE), Inc.

*Society for Annuity Facts and Education (SAFE), Inc. now a 501(c)(3)*

WASHINGTON, DC, UNITED STATES, April 8, 2014 /EINPresswire.com/ -- The Society for Annuity Facts and Education, Inc. ([SAFE](#)) is proud to announce it has been granted tax-exempt status as a charitable organization dedicated to educational purposes under Section 501(c)(3) of the United States Internal Revenue Code. SAFE serves as a resource for consumers to learn in a fact-based environment safe from sales pressure and bias about annuity products and their role in insuring retirement savings and retirement income.

Founded in June 2012, obtaining 501(c)(3) status represents a significant milestone for SAFE. Contributions donated to SAFE are now fully tax-deductible retroactive to the founding date. Tax-deductible donations may be made online via <http://annuityed.org/safe-donors/pledge-to-support-annuity-education>. Importantly, SAFE is now eligible to apply for government and foundation grants, which will further broaden its access to resources and strengthen its ability to provide accurate, easy-to-understand information about annuities and their role in insuring retirement saving and retirement income to Americans.

“With retirement savings nearing all-time lows, many middle income Americans simply don’t have excess funds to dedicate to retirement planning. Compounding the issue is the fact there appears to be a general lack of understanding of how planning needs to change after retirement. SAFE believes that straight-forward information about annuities Americans is critical,” explained Mark T. Stone, SAFE’s President.

SAFE is guided by an esteemed Board of Directors comprised of representatives from all facets of the insurance industry. The newest, distinguished additions to the SAFE Board are Jeremy Alexander from Beacon Research and Faisa Stafford from Life Happens. SAFE’s current Board roster includes:

- Jeremy Alexander, President, Beacon Research
- Lowell Aronoff, Chief Executive Officer, CANNEX Financial Exchanges Limited, SAFE Vice President Elect
- Pam Heinrich, Esq., Heinrich Law, SAFE Secretary
- Phil Holstein, Principal, Holstein Financial
- Rich Lane, National Director of Sales and Marketing, The Standard
- Rod Mims, Senior Vice President and National Sales Manager, Athene Annuity
- Gregory L. Mitchell, Senior Vice President & Actuary, Guggenheim Insurance Services, SAFE Treasurer
- Sheryl J. Moore, Founder, Creator, President & CEO of Wink, Inc. and President & CEO of Moore Market Intelligence. SAFE President Elect
- Kim O’Brien, President & CEO, National Association for Fixed Annuities, (NAFA)
- Faisa Stafford, Chief Operating Officer and Chief Financial Officer, Life Happens (formerly the LIFE Foundation)
- Mark T. Stone, Principal & Chief Marketing Strategist, Insurance Insight Group, SAFE President

- Richard J. Tucker, Vice President - Sales & Marketing, Canada Life Reinsurance
- Corey Walther, Chief Operating Officer, Allianz Life Financial Services

In the months ahead SAFE has several initiatives on the docket – most notably as a key sponsor of Annuity Awareness Month this coming June. Along with NAFA and other association sponsors, Annuity Awareness Month will provide educational material, webcasts and social media communications to help educate financial professionals and the public on the important role fixed, fixed indexed, and variable annuity products play in helping Americans save for retirement.

Organized as a charitable, educational association, SAFE:

- Provides a forum for the exchange of information among all persons having an interest in annuity products.
- Provides opportunities for education, advancement, and improvement of all aspects of annuities through meetings, seminars, communications, publications, and other programs and activities.
- Provides insurance and financial services professionals, consumers, and the media with an accurate, comprehensive, and unbiased source of information about annuities to help them make informed decisions.
- Is a solid educational resource for insurance and financial professionals and their clients.
- Communicates important facts about all annuity products in order to limit the amount of misinformation each audience (professionals, consumers, and the media) is exposed to.

More about SAFE:

For more information, contact Siobhan McNulty via email at [siobhan.mcnulty@iigsolutions.com](mailto:siobhan.mcnulty@iigsolutions.com), or via phone 801-290-3311. Follow SAFE's activities on Twitter via @AnnuityEd, or visit [AnnuityEd.org](http://AnnuityEd.org) to listen to educational podcasts, learn the basics about annuities, utilize a variety of interactive financial calculators, and give SAFE's Wealth & Income Planner tool a test drive.

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