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David Macchia, MBA, RMA, CBBF



# About David

Developer of the revolutionary Constrained Investor® strategy for retirement income planning, David Macchia is an author, entrepreneur, public speaker and I.P. inventor whose work is centered on improving Americans' retirement security. A leading figure in the field of retirement income planning, David is founder of Wealth2k Inc, the nation's leading provider of advisor-centric income planning solutions. He is the creative force behind the popular, Income for Life Model®, as well as Women & Income®, the first retirement income solution developed expressly for "Boomer" women. David is a fearless defender of women's interests. He is leading a movement that seeks to ignite positive change in the ways the wealth management industry addresses women's retirement security. needs.

David writes frequently about retirement income planning and macroeconomics. His articles have appeared in numerous publications including Advisor Perspectives, Financial Planning, Research Magazine, Retirement Income Journal, Think Advisor, Financial Advisor Magazine, Insurance News Net, and Retirement Investor. He is the author of two books, Lucky Retiree and Constrained Investor: How to Avoid a Devastated Retirement.

An accomplished public speaker, David has delivered dozens of keynote addresses for organizations including the Financial Planning Association, Retirement Income Industry Association, Pershing, Bank Insurance and Securities Association, National Association for Fixed Annuities, LIMRA, SRI, and the Insured Retirement Institute.

David earned an MBA, with Honors, from Boston University Questrom School of Business. He holds the RMA and CBBF professional designations.

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