

# Media Kit

David Macchia



# About David

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 planning solution, The Income for Life Model<sup>®</sup> as well as the Constrained Investor<sup>®</sup> income planning framework.

David's most recent retirement innovation is Defined Benefit Investor<sup>™</sup>, is a patent pending technology application that transforms any vehicle accepting systematic deposits into a personal, defined benefit pension. Three sub variants- Defined Benefit Life<sup>™</sup>, Defined Benefit Annuity<sup>™</sup> and Defined Benefit 401(k)<sup>™</sup>, relate to the type of vehicle used to fund the personal defined benefit plan.

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 consumer finance 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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