RSSA® Program FAQ

Registered Social Security Analysts

What does the RSSA® Program package include?
It includes the 5-module education course, RSSA Roadmap® software and 30 complimentary Client Portal invites, RSSA® Final Exam (+1 re-take), first year of NARSSA Membership which includes marketing materials, presentations, scripts, and more.

What is the cost of the RSSA® Program package?
The cost of the RSSA® program is $2,329. (Partner channels may receive custom pricing options and packages) There is an annual fee to maintain use of the credential and platform. The fee includes rights to the software, education, and membership resources. The annual fee is $479/year.

Are there monthly or annual costs for the program?
Annual fee of $479/year. There are no monthly fees.

Are there any other fees I should be aware of?
The only additional fees are the RSSA Roadmap® Client Portals, and this is an optional add-on. You receive 30 complimentary Client Portal invites as part of the package. To continue distributing portals beyond the initial 30, the cost is $25/portal invite.

What is the RSSA Roadmap® Client Portal?
As an RSSA®, you receive a unique RSSA® webpage, where prospects and clients can go to register their own RSSA Roadmap® Client Portal account to securely enter their data and begin optimizing their Social Security benefits. As clients enter their information, it automatically syncs into your RSSA Roadmap® dashboard, making the process of managing and gathering data easy and efficient. Your unique RSSA® webpage + the Client Portal registration is a great lead generation tool when hosting live events, webinars, and running online marketing campaigns to attract new clients.

What is the RSSA® Roadmap Software?
RSSA® Roadmap software is our proprietary Social Security optimization software. The software and software training are included in the program. You can use this software to run analyses to optimize your clients' benefits.

Can I charge a fee as an RSSA®?
A Registered Social Security Analyst® (RSSA®) can indeed charge a fee for providing Social Security optimization services. Social Security optimization is a service that can be approached in two different ways: as a billable service or as a value-add service.

How much can I charge as an RSSA®?
The fee can vary based upon several factors. Complexity of case, consultation time, client's financial status, demographics of your geographic region, etc. It's recommended to have a transparent fee structure in place that clients can understand and appreciate. As part of the ethical standards of the RSSA® program, ensure that your fees are reasonable, fair, and commensurate with the services you provide.

Do you have to re-certify with testing each year?
RSSAs are required to complete 4 CE credits every year. The CE courses are included in the annual membership fee of $479/year.

How much and what type of support are we given by the in-house RSSA® experts?
Throughout the education you'll have access to an in-house support team of RSSAs for education, case, and software support to help you successfully pass the RSSA® exam. Once you become an RSSA® you have access to the same in-house team for all the above plus assistance with client cases and much more. Support is central to the RSSA® Program.

Is RSSA® approved by the Social Security Administration?
RSSA® has no affiliation with the Social Security Administration or any other government agency. The mission of NARSSA (RSSA®) is to provide financial professionals and advisors with an educational online platform to acquire the knowledge, obtain a professional credential that demonstrates their competency, and provide professionals with the resources and technology they need to better serve clients that seek advice on issues related to Social Security and Medicare.

Is the RSSA® course approved for continued education and if so, by who?
The RSSA® program is approved for professional continuing education by NASBA for the CPA Profession, the IRS for tax professionals, the CFP® Board for Certified Financial Planners, Broadridge for the AIF® credential and 41 state insurance licensing boards. NARSSA is listed in the FINRA Compliance Vendor Directory and materials have been FINRA reviewed. The RSSA® credential is also included in the FINRA Professional Designations Database. (Note: FINRA does not approve or endorse any professional credential or designation.)

How many continued education credits does the course count for?
The training curriculum meets QAS requirements and is accepted for self-study in all states for CPAs by NASBA (15.5 CPE credits), for EAs and PTIN holders by the IRS (10 CE credits), for CFPs by the CFP Board (8.5 CE credits), for the AIF/AIFA/PPC credentials by Broadridge Fi360 (8.5 CE credits), and for insurance agents (up to 9 CE credits). https://www.narssa.org/resources/cpe-credits/

Can I use the RSSA® designation behind my name?
After passing the RSSA® Final Exam, you can use the RSSA® credential after your name. The RSSA® credential indicates you have met NARSSA's initial and ongoing requirements and have agreed to adhere to NARSSA's high standards of professional competency and ethics. RSSA® must always use the ® symbol.

Do I need to have E & O insurance for Social Security expertise?
The RSSA® program is an educational program specifically tailored for Social Security. It also includes the RSSA Roadmap® optimization software which imports your clients' earnings records from ssa.gov to provide accurate Social Security analyses and planning. The program is designed to equip advisors with the expertise to guide clients and prospects in optimizing their Social Security benefits and claiming strategies. As an agent providing any type of advice, the requirement for errors and omissions (E&O) insurance can vary depending on various factors. As a financial advisor or agent, it is always advisable to consult with your team to make an informed decision regarding the need for E&O insurance as an agent or financial advisor providing any type of advice or service.

Is there an additional cost to the RSSA Roadmap® software?
No. The software is included in the program.

How does the RSSA® final exam work?
After successful completion of the 5-module online self-study RSSA® Program, you will be eligible to register and take the RSSA® Final Exam to obtain your RSSA® designation. The exam is given on the second and fourth Tuesday of each month and consists of two parts. You will take the exam online from the convenience of your office or home computer. All registrants must have access to a computer with a webcam on the date they will be taking the exam since it is proctored by a live person monitoring your test-taking. The exam is closed book, but you may use the provided RSSA® Final Exam Reference Document during the exam. The fee for 2 final exam attempts is included in the RSSA® Program package.

Do you have marketing materials in other languages?
We are working on offering a selection of marketing materials in various languages to cater to our diverse clientele. We understand the importance of providing resources that our advisors and agents can utilize to reach a broader audience.

We recognize the value of inclusivity in communication, and we are dedicated to making our marketing materials even more accessible by adding more resources in additional languages. Our team is diligently working to create new content that reflects the linguistic needs of our community. Stay tuned for updates as we continue to enhance our offerings to better serve you and your clients.

How can I market myself as a Social Security expert?
Marketing yourself as an RSSA® Social Security expert is all about establishing credibility, showcasing your expertise, and reaching potential clients effectively. As an RSSA®, you're provided with a suite of tools and resources designed to help you stand out in the field including a personalized RSSA® webpage which not only highlights your expertise but also features a lead generation form and the RSSA Roadmap® Client Portal registration form, both of which are instrumental in capturing leads. We provide you with scripted presentations and a wealth of resources to ensure that you are prepared to engage and inform your audience, whether it's during seminars, webinars, or one-on-one meetings. We also offer guidance on best practices for marketing your services through various channels, including social media, local networking groups, and professional seminars. We support your growth with updates on the latest Social Security strategies and changes, so you're always providing up-to-date advice. By leveraging these tools, resources, and whole lot more that you'll experience once you become an RSSA®, you can effectively market yourself as a Social Security expert. Remember, the key to successful marketing is consistency and providing value — ensure that every interaction offers potential clients a clear understanding of how your expertise can benefit them.