Retirement Industry Conference

April 11 – 13, 2018

Chicago Marriott Downtown Magnificent Mile, Chicago, IL

2018 Conference

PROGRAM

Building Opportunities for the Future

LIMRA·LOMA Secure Retirement INSTITUTE

SOCIETY OF ACTUARIES

Wednesday, April 11

CONCURRENT SESSIONS — *4:00 to 5:00 p.m.*

Chicago Ballroom B, 5th Floor

1.1 Taking On the "D" Word

SCOTT KALLENBACH, FLMI, Research Director, LIMRA; **ERIC SONDERGELD, ASA, CFA,** Corporate Vice President, LIMRA

Chicago Ballroom G, 5th Floor

1.2 Technology in Workplace Retirement Plans

WARREN CORMIER, Executive Director, DCIIA Retirement Research Center; **ALLEGRA HEYLIGERS,** Head of Sales Enablement, Wells Fargo Asset Management; **ELIZABETH KELLY, MSc, J.D.,** Senior Vice President of Operations, United Income; ***Moderator:*** **LEW MINSKY,** President and CEO, DCIIA

Chicago Ballroom D/E, 5th Floor

1.3 Blockchain and Insurance

ARUNASHISH MAJUMDAR, Head of Innovation, Insurance, Tata Consultancy Services; **CHRISTOPHER MCDANIEL,** Executive Director, Risk Block Alliance, The Institutes; ***Moderator:*** **JUDY ZAIKEN,** Corporate Vice President, Strategic Initiatives, LIMRA

Houston Room, 5th Floor

1.4 Asia Consumers — Why? They're 2/3rds of the World Population

R. DALE HALL, FSA, MAAA, CFA, CERA, Managing Director, Research, Society of Actuaries; **LARRY HARTSHORN,** Corporate Vice President and Director, LIMRA & LOMA

Grand Ballroom, 7th Floor

WELCOME RECEPTION WITH EXHIBITORS — *5:15 to 6:30 p.m.*

THURSDAY, APRIL 12

Grand Ballroom, 7th Floor
CONTINENTAL BREAKFAST — *7:00 to 8:00 a.m.*

Chicago Ballroom D/E, 5th Floor
GENERAL SESSION — *8:00 to 10:00 a.m.*

CAROLYN JOHNSON, *Presiding*
Chief Executive Officer, Annuities and Individual Life
Voya Financial

The Future of Financial Planning: Personalized Finance in the Digital World ***(1.0 EA Non-Core Credit Hour)***
Sponsored by Voya

Introduced by: Richard Mason
Voya Behavioral Finance Institute for Innovation

SHLOMO BENARTZI, Ph.D.
Professor and Co-Founder
Behavioral Decision-Making Group
UCLA Anderson School of Management

Plan Sponsor Confidential ***(1.2 EA Non-Core Credit Hours)***

KRIS BLUMKA
Retirement Plans Administrator
Schiff Hardin LLP

TOM CULLEN
Total Rewards Manager
IDEAL INDUSTRIES, INC.

LISA DESANTO
Retirement Program Manager
Crate and Barrel

ALISON SALKA, Ph.D., ***Moderator***
Senior Vice President and Managing Director
of Member Benefits and Research
LIMRA LOMA Secure Retirement Institute

Grand Ballroom, 7th Floor

REFRESHMENT BREAK — *10:00 to 10:30 a.m.*

CONCURRENT SESSIONS — *10:30 to 11:45 a.m.*

Chicago Ballroom D/E, 5th Floor

2.1 Annuities: Are We Swinging and Missing on Guaranteed Lifetime Income?

DOUG FRENCH, Managing Principal, EY; **TODD GIESING,** Director, Annuity Research, LIMRA Secure Retirement Institute

Chicago Ballroom B, 5th Floor

2.2 Consumer Decision-Making and Managing of Retirement Risks *(1.5 EA Non-Core Credit Hours)*

CAROL A. BOGOSIAN, ASA, President, CAB Consulting; **MATHEW GREENWALD, Ph.D.,** President, Greenwald & Associates

Houston Room, 5th Floor

2.3 Financial Wellness *(1.5 EA Non-Core Credit Hours)*

KARA ARDIS, Director of Business Strategy, Charles Schwab Retirement Services; **KENJE MALLOT,** Financial Solutions Project Manager, Alight Solutions, Inc.; **ANNE THIBEAULT,** Vice President, Financial Wellness Strategy and Deployment, Prudential; ***Moderator:*** **DEB DUPONT,** Associate Managing Director, Workplace Retirement Research, LIMRA Secure Retirement Institute

Chicago Ballroom G, 5th Floor

2.4 Product: The View from the Other Side!

TIM PFEIFER, FSA, MAAA, President, Pfeifer Advisory LLC; **ROB STONE, FSA,** Financial Advisor; Northwestern Mutual

Grand Ballroom, 7th Floor

LUNCHEON — *11:45 a.m. to 1:00 p.m.*

Los Angeles Room, 5th Floor

CANADIAN ISSUES LUNCHEON — *11:45 a.m. to 1:00 p.m.*

Sponsored by CANNEX Financial Exchanges

(Pre-registration is required.)

CONCURRENT SESSIONS — *1:00 to 2:00 p.m.*

Chicago Ballroom D/E, 5th Floor

3.1 Annuity Product Trends and Issues

NICHOLAS CARBO, FSA, MAAA, Senior Consultant, Oliver Wyman; **MATTHEW COLEMAN, FSA, MAAA,** Senior Consultant, Willis Towers Watson

Houston Room, 5th Floor

3.2 Small Business Insights

THOMAS KRET, CIMA, CRPS, Senior Retirement Plan Consultant, UBS Financial Services, Inc.; **BRIAN LAMPSA, CIMA, AIF,** Senior Vice President, Investments, Raymond James and Associates, Inc.; ***Moderator:*** **MARK PARACER, FLMI, FSRI,** Assistant Research Director, LIMRA Secure Retirement Institute

Chicago Ballroom B, 5th Floor

3.3 Dynamics in Your Distribution Channels: Where Is the Momentum?

MARK HOPKINS, CLU, Executive Director, Financial Services Advisory Practice, EY; **SEAN O'DONNELL,** Vice President, Member Relations & Consulting, LIMRA

Chicago Ballroom G, 5th Floor

3.4 What's Old Is New: Aging Consumer Needs and Who Pays?

KERRY MCMULLAN, Head of Sales and Client Development, Life and Health, U.S., Swiss Re; **DOMENICO SAVARESE,** Global Head of Life and Health Products Strategy, Swiss Re

BREAK — *2:00 to 2:15 p.m.*

CONCURRENT SESSIONS — *2:15 to 3:15 p.m.*

Chicago Ballroom D/E, 5th Floor

4.1 What Do RIAs Really Think of Annuities?

LINDSAY FAUSSONE, Vice President, Business Development, Trust Company of America; **ALEX PAPADOPOULOS, CRPS,** Senior Vice President, IHT Wealth Management; **JIM WEIL, CFP, CIMA,** Financial Planner, Private Vista LLC; ***Moderator:*** **JONATHAN ESTES,** Sales Director, Nationwide

Houston Room, 5th Floor

4.2 The Consultant's View...A Critical Perspective

BRIAN DENNEN, Principal, Curcio-Webb; **JIM O'SHAUGHNESSY,** Managing Partner, Sheridan Road Financial, LLC; **RICK SHOFF,** Managing Director, CAPTRUST; ***Moderator:*** **GARY LINEBERRY,** Managing Director, LIMRA LOMA Secure Retirement Institute

Distribution of Conference Session

	#	Session Title
Wednesday		
4:00 to 5:00 p.m.	1.1	Taking On the "D" Word *(Chicago B)*
	1.2	Technology in Workplace Retirement Plans *(Chicago G)*
	1.3	Blockchain and Insurance *(Chicago D/E)*
	1.4	Asia Consumers — Why? They're 2/3rds of the World Population *(Houston Room)*
Thursday		
10:30 to 11:45 a.m.	2.1	Annuities: Are We Swinging and Missing on Guaranteed Lifetime Income? *(Chic*
	2.2	Consumer Decision-Making and Managing of Retirement Risks *(Chicago B)*
	2.3	Financial Wellness *(Houston Room)*
	2.4	Product: The View From the Other Side! *(Chicago G)*
1:00 to 2:00 p.m.	3.1	Annuity Product Trends and Issues *(Chicago D/E)*
	3.2	Small Business Insights *(Houston Room)*
	3.3	Dynamics in Your Distribution Channels: Where Is the Momentum? *(Chicago B)*
	3.4	What's Old Is New: Aging Consumer Needs and Who Pays? *(Chicago G)*
2:15 to 3:15 p.m.	4.1	What Do RIAs Really Think of Annuities? *(Chicago D/E)*
	4.2	The Consultant's View...A Critical Perspective *(Houston Room)*
	4.3	InsurTech Developments in the Retirement Industry *(Chicago B)*
	4.4	Trends in Workplace Retirement *(Chicago G)*
Friday		
9:30 to 10:30 a.m.	5.1	Longevity Lifestyle Preparation: How to Help Clients Prepare to Live Well to anc
	5.2	Product Development: What's Next for Annuity Products? *(Chicago D/E)*
	5.3	Workplace Retirement Litigation Update and Insights *(Houston Room)*
	5.4	The Other Retirement Crisis and What Our Industry Can Do About It *(Chicago G)*
10:45 to 11:45 a.m.	6.1	Newly Proposed ASOPs: Pricing, Modeling, and Setting Assumptions *(Chicago B)*
	6.2	Annuity Placements: The View From Both Sides of the Fence *(Chicago G)*
	6.3	Focus on Governmental Plans *(Houston Room)*

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Chicago Ballroom B, 5th Floor

4.3 InsurTech Developments in the Retirement Industry

MATTHEW CAREY, Co-Founder, Blueprint Income; **SCOTT MOODY,** Co-Founder, CEO and Chief Client Advocate, K4 Connect; **ADAM SEIFER,** Co-CEO and Co-Founder, Everplans; ***Moderator:*** **TIM ROZAR, FSA, CERA, MAAA,** Senior Vice President, RGAx

Chicago Ballroom G, 5th Floor

4.4 Trends in Workplace Retirement *(1.2 EA Non-Core Credit Hours)*

MERL BAKER, Principal, Brightwork Partners LLC; **DEB DUPONT,** Associate Managing Director, Workplace Retirement Plans, LIMRA Secure Retirement Institute

Grand Ballroom, 7th Floor

REFRESHMENT BREAK — *3:15 to 3:45 p.m.*

Sponsored by Hannover Re

Chicago Ballroom D/E, 5th Floor

GENERAL SESSION — *3:45 to 4:45 p.m.*

MELANIE HENDERSON, ***Presiding***
Executive Director
EY

The Retirement Industry: What Role Will You Play In the Future?

MARIA FERRANTE-SCHEPIS
President
Maddock Douglas, Inc.

Los Angeles Room, 5th Floor

WOMEN'S LEADERSHIP RECEPTION — *4:45 to 5:45 p.m.*

Sponsored by EY

Chicago Sports Museum — 835 North Michigan Ave.

RETIREMENT INDUSTRY CONFERENCE NETWORKING EVENT — *6:00 to 8:00 p.m.*

Sponsored by S&P Dow Jones Indices

Open to all conference attendees.

FRIDAY, APRIL 13

Grand Ballroom, 7th Floor

CONTINENTAL BREAKFAST — *7:00 to 8:00 a.m.*

Chicago Ballroom D/E, 5th Floor

GENERAL SESSION — *8:00 to 9:00 a.m.*

ANDREW PETERSON, FSA, EA, MAAA, FCA, ***Presiding***
Senior Staff Fellow, Retirement Systems
Society of Actuaries

Inside Washington: The Policy and Politics of Financial Services

TOM CRAWFORD
Senior Managing Director, Strategic Communications
FTI Consulting

Grand Ballroom, 7th Floor

REFRESHMENT BREAK AND EXHIBITOR RAFFLE — *9:00 to 9:30 a.m.*

CONCURRENT SESSIONS — *9:30 to 10:30 a.m.*

Chicago Ballroom B, 5th Floor

5.1 Longevity Lifestyle Preparation: How to Help Clients Prepare to Live Well to and Through Retirement *(1.2 EA Non-Core Credit Hours)*

NAG ODEKAR, Vice President, Marketing, Great-West Life and Annuity Insurance Company; ***Moderator:*** **KERRY PECHTER,** Editor and Publisher, Retirement Income Journal

Chicago Ballroom D/E, 5th Floor

5.2 Product Development: What's Next for Annuity Products?

BRYAN PINSKY, FSA, CFA, MAAA, Senior Vice President, Retirement Products, AIG; **AARON SARFATTI,** Partner, Oliver Wyman; **VINIT SRIVASTAVA,** Managing Director Strategy Products and ESG, S&P Dow Jones Indices; ***Moderator:*** **ALAN GRISSOM,** Global Head of Insurance, S&P Dow Jones Indices

Houston Room, 5th Floor

5.3 Workplace Retirement Litigation Update and Insights *(1.2 EA Non-Core Credit Hours)*

JEFFREY RUSSELL, Partner, Bryan Cave LLP; **LISA VAN FLEET,** Partner, Bryan Cave LLP

Chicago Ballroom G, 5th Floor

5.4 The Other Retirement Crisis and What Our Industry Can Do About It

NICK HALEN, Director, New York Life Insurance Company; **CLAUDEL LAGUERRE, FSA, CFA,** Director, New York Life Insurance Company

BREAK — 10:30 to 10:45 a.m.

CONCURRENT SESSIONS — *10:45 to 11:45 a.m.*

Chicago Ballroom B, 5th Floor

6.1 Newly Proposed ASOPs: Pricing, Modeling, and Setting Assumptions *(SOA Professionalism Session)*

MIKE BOOT, FSA, MAAA, Managing Director, Actuarial, Society of Actuaries; **NICK FIECHTER, FSA, MAAA,** Actuary, Lincoln Financial Group

Chicago Ballroom G, 5th Floor

6.2 Annuity Placements: The View From Both Sides of the Fence *(1.2 EA Non-Core Credit Hours)*

MICHAEL CLARK, FSA, FCA, EA, MAAA, Director and Consulting Actuary, P-Solve; **AMANDA EGAN,** Regional Sales Director, Mutual of Omaha; **DAVID JAFFE, FSA, EA,** Vice President, Strategic Initiatives, Legal and General

Houston Room, 5th Floor

6.3 Focus on Governmental Plans

WILLIAM ABRAMOWICZ, CRC, Government Team Leader and Managing Director, Workplace Solutions, MassMutual; **GLENN SHERMAN,** Vice President, Retirement Plans, ICMA-RC; ***Moderator:*** **RYAN SCANLON,** Associate Research Analyst, LIMRA Secure Retirement Institute

CONFERENCE ADJOURNS — *11:45 a.m.*

Mobile App/Wi-Fi Info:

Get the Conference Mobile App!

How do I get the app?

Download: **Loopd** from App Store or Google Play
Access Code: 431605
Login: the email address you used to register for the conference
Password: NetworkNow

Join the conversation!

WI-FI Information

Join Network: Marriott_Conference
Password: Retirement18

2019 RETIREMENT INDUSTRY CONFERENCE

April 3 – 5, 2019
Marriott Baltimore Waterfront, Baltimore, MD

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