



Presentation Handouts

As of April 7, 2009

Please print out the presentations or download them to your laptop and bring them with you to the conference. Presentations will be added to this page as we receive them.

**If a presentation is not available pre-conference, we anticipate presenters will bring handouts to the meeting and post the PowerPoint after the conference.*

GS1 Demographic Trends Impacting the Retirement Industry

1.1 Annuity and Long-Term Care Combination Products in 2010

[Cary Lakenbach, FSA, MAAA, CLU, Actuarial Strategies, Inc.](#)

1.2 Index Annuities: Regulation, Sales and Product Trends

Brian Grigg, CFP, CLU, ChFC, Old Mutual Financial Network, *Moderator*

[Eric Marhoun, Old Mutual Financial Network](#)

[Sheryl Moore, Advantage Group Associates, Inc., AnnuitySpecs.com](#)

1.3 Retirement Income Advisor Education: An Advisor's Ticket to Real Success

[Garth Bernard, FSA, MAAA, Retirement Income Solutions Enterprise](#)

1.4 Annuity Guarantees Are Migrating to the Non-Annuity World!

1.5 This session has been cancelled.

1.6 What's New in DC Investment-Only Marketing?

2.1 A Gatekeeper's Perspective:

How Firms Select and Manage Annuity Carriers on Their Shelf

Michael P. Sparrow, FSA, MAAA, Nationwide Financial, *Moderator*

[John C. Johnson, National Planning Holdings, Inc.](#)

[Mike Walker, CPCU, CIC, Wachovia Insurance Group](#)

2.2 Economic Capital: Trends and Developments on the U.S. and International Fronts

Sue (Sell) Saip, FSA, MAAA, Milliman, Inc., *Moderator*

[Jay Glacy, ASA, MAAA, CERA, Milliman, Inc.](#)

[Henny Verheugen, AAG, Milliman, BV](#)

2.3 Constructing Retirement Income Portfolios That Really Work

[Steven Feinschreiber, Fidelity Investments](#)

- 2.4 Structuring Organizations to Tackle the Retirement Income Opportunity: 2009 Update**
- 2.5 Cash Balance Plans in the Pension Protection Act World**
Ron E. Merolli, JD, National Life Group
Mary Read, CPC, QPA, National Life Group
- 2.6 Hot Funds — Evolution and Revolution in Investment Solutions**
Scott Brooks, CFA, *Moderator*
Hal Clark, CFA, Invesco, AIM
Patrick Flanagan, Invesco AIM
Kenneth Verzella, Prudential Retirement
Christopher Whitlow, UBS Financial Services, Inc.
- 3.1 Federal and State Regulatory Update**
William A. Waldie, Jr., Transamerica Capital Markets, *Moderator*
Eric C. DuPont, MetLife
Kelly Ireland, American Council of Life Insurers
[Part 1](#)
[Part 2](#)
- 3.2 Trends, Challenges, and Opportunities: The Outlook for Variable Annuities and GLWBs**
Deborah Tucker, NAVA, *Moderator*
Tony Ferreira, Cogent Research, LLC
Keith E. Golembiewski, FLMI, AAPA, FFSI, Hartford Life Insurance Company
- 3.3 A Room with a View Toward Income**
- 3.4 Challenge and Opportunity: Responding to the New Retirement**
Mike A. Boot, FSA, MAAA, FCA, Society of Actuaries, *Moderator*
Anna Rappaport, FSA, MAAA, Anna Rappaport Consulting
- 3.5 The New 403(b) Frontier**
Karen Betts, OneAmerica Financial Partners, Inc., *Moderator*
Wesley Compton, CPA, CEBS, MidAmerica Administrative & Retirement Solutions, Inc.
Kevin Kidwell, OneAmerica
Andrew Wilkinson, OneAmerica
- 3.6** This session has been cancelled.
- 4.1 Hedging Through Market Turmoil**
[Leong Chew, FSA, MAAA, Milliman, Inc.](#)
[Harold Schafer, Nationwide Financial](#)
- 4.2 To SPIA, GLWB, or GMIB? That Is the Question**
Daniel Kruse, FSA, MAAA, Securian Financial Group, *Moderator*
Mitchell Katcher, FSA, MAAA, Principal, Deloitte Consulting, LLP
Ronald Sleiman, FSA, MAAA, Deloitte Consulting, LLP
- 4.3 Investor Psychology and Retirement Readiness**
Karen Betts, OneAmerica Financial Partners, Inc.
Corey L. Dillon, ALPS Advisors, Inc.

- 4.4 What's in the Box? Analysis of Retirement Income Software**
James R. Huffman, FLMI, ACS, LOMA, *Moderator*
Michael P. Fitzgerald, Celent
- 4.5** This session has been cancelled.
- 4.6 Opportunities in the Rollover Market**
Matthew Drinkwater, Ph.D., FLMI, AFSI, PCS, LIMRA
- GS2 The Pulse on Public Policy**
James M. Delaplane Jr., Partner, Davis & Harman, LLP
- 5.1 Annuity Market Trends**
Joseph Montminy, ASA, MAAA, LIMRA
- 5.2 Retirement Marketing: hit the Bull's Eye and Avoid Boondoggles!**
Julia Lennox, MetLife
Kurt A. Mansfield, Prudential
- 5.3 What's Driving Growth in Retirement Income Outside North America?**
Jennifer R. Berlin, LLIF, LIMRA
- 5.4** This session has been cancelled.
- 5.5 Broker Dealers: Training for Retirement Income Solutions**
Ted Hatcher, LOMA, *Moderator*
Kim LaBarbiera-Paschall, JD, Ameritas Investment Corp.
David Stoeffel, Northwestern Mutual Life Insurance Company
- 5.6** This session has been cancelled.
- 6.1 The Great Race: Product Development and Speed to Market**
Mary Kaye Korzun, CSC
Cande Olsen, FSA, MAAA, Actuarial Resources Corporation
- 6.2 Attracting and Retaining a Diverse Workforce**
Rebecca Maddox, CPA, Maddox Smye, LLC
- 6.3 Consumers' Trade Off — What Matters Most for Retirement Income?**
Marie Z. Rice, LIMRA
Richard J. Shakarchi, Ph.D., Northstar Research Partners (USA), LLC