



## 2014 Retirement Industry Conference

### Attendees' Titles and Companies

<b>Title</b>	<b>Company</b>
Strategy and Planning Director	AARP Services, Inc.
ASW Technology Lead	Accenture
Life and Annuity Sales/Marketing	Accenture
Product Lead for Life and Annuity Software	Accenture
Product Specialist	Accenture
Sales Director	Accenture
Sales Director	Accenture
Chief Executive Officer	Adrea Rubin Marketing, Inc.
Associate Director, Strategic Initiatives	AIG
Managing Consultant	AIG
Vice President, Product Research and Innovation	AIG
Director and Actuary	AIG Life and Retirement
VP & Actuary	AIG Life and Retirement
Vice President, Managing Director, Sr. Product Director	AllianceBernstein
Assistant Vice President	Allianz Life
Chief Distribution Officer	Allianz Life
Sr. Vice President of Sales	Allianz Life
VP Consumer Marketing & Solutions	Allianz Life
Professor	American College & inStream Solutions
Senior Counsel	American Council of Life Insurers
Sr. Marketing Manager, Product Development	Americo
Sr. Vice President, Financial Planning and Advisor Business Development Group	Ameriprise Financial
2nd VP & Assoc Actuary	Ameritas Life Insurance Corp.
Product Research Analyst	Ameritas Life Insurance Corp.
Consultant	Aon Hewitt
Market Research Analyst	Athene USA
VP Annuity Product	Athene USA
Managing Director, Head of Association Business	AXA
Senior Director	AXA
Lead Director, Annuity Product Implementation	AXA Equitable
Senior Director & Actuary	AXA US

Head of Insurance & Annuities	Bank of America Merrill Lynch
President	Behavioral Research Associates
VP	BlackRock
Assistant	Bradesco Vida e Previdencia
Commercial Manager	Bradesco Vida e Previdencia
Commercial Manager	Bradesco Vida e Previdencia
Commercial Manager	Bradesco Vida e Previdencia
Commercial Manager	Bradesco Vida e Previdencia
Department Manager	Bradesco Vida e Previdencia
Department Manager	Bradesco Vida e Previdencia
Executive Superintendent	Bradesco Vida e Previdencia
President	Bradesco Vida e Previdencia
Superintendent of Area	Bradesco Vida e Previdencia
Superintendent of Area	Bradesco Vida e Previdencia
Superintendent of Area	Bradesco Vida e Previdencia
Superintendent of Area	Bradesco Vida e Previdencia
Superintendent of Area	Bradesco Vida e Previdencia
Superintendent of Area	Bradesco Vida e Previdencia
Training Coordinator	Bradesco Vida e Previdencia
Training Coordinator	Bradesco Vida e Previdencia
Principal	Brightwork Partners
Principal	C Devine & Associates
President	CAB Consulting
Vice President - Sales & Marketing	Canada Life Reinsurance
CEO	CANNEX Financial Exchanges Limited
President (QWeMA)	CANNEX Financial Exchanges Limited
Chief Operating Officer	Castle Rock Innovations, Inc.
Director	Charles Schwab
EVP, Client Solutions	Charles Schwab
Managing Director	Charles Schwab
Vice President	Charles Schwab
Senior Director, Sales	CIC
Product Support Manager - Annuities	CMFG Life
President and CEO	ComedySportz of Chicago, Inc.
Sr. Director, Sales	Communication Intelligence Corporation (CIC)
CEO & Founder	Competiscan
EVP of Business Development	Competiscan
Associate Actuary	Co-operators Life Insurance Company
Director, Business Development	Corporate Insight, Inc.
Senior Analyst, Annuity & Life Insurance	Corporate Insight, Inc.
Sr. VP Marketing	CreativeOne
VP Product Actuary	CreativeOne
Actuary	CUNA Mutual Group
Director, Actuarial Management	CUNA Mutual Group

Market Research Program Consultant	CUNA Mutual Group
National Sales Director	CUNA Mutual Group
Senior Regional Insurance Associate	CUNA Mutual Group
VP- Product Executive	CUNA Mutual Group
CFO	CUSD 300
Partner	Davis & Harman LLP
Benchmark Client Relationships	Deloitte Consulting LLP
Industry Relationships	Deloitte Consulting LLP
Senior Marketing Consultant	Desjardins Insurance
Sr. Vice-President Group Retirement Savings	Desjardins Insurance
Product Manager	DST Retirement Solutions
Director	DTCC
Sales Director	Earthintegrate
Sales Director	Earthintegrate
Senior Director, Enterprise Sales	Ebix Inc.
Sr. Sales Executive	Ebix Inc.
Product Leader - Annuities	Edward Jones
Sr. IRA Product Leader	Edward Jones
Market Research Consultant	Empire Life
Vice President, Wealth Management Solutions	EquiSoft Inc
VP Insurance Business Development	EquiSoft Inc
VP Insurance Division	EquiSoft Inc
Director Product Development and Marketing	Equitable Life of Canada
Product Development Actuary	EquiTrust
First Vice President Human Resources Operations	Equity Residential
Principal	Ernst & Young
Product Manager	Ernst & Young
Senior Actuarial Analyst	Ernst & Young
Actuarial Advisor	Ernst & Young LLP
Principal	Ernst & Young LLP
Manager, Wealth Management	Family Guardian Insurance Co. Ltd.
VP, Investments	Family Guardian Insurance Co. Ltd.
Life Sales Development VP	FBL Financial Group, Inc.
Chief Distribution Officer	Fidelity & Guaranty Life
Director, Product Development	Fidelity & Guaranty Life
SVP, Research & Development	Fidelity Investments
Vice President & Actuary	Fidelity Investments
VP, Global Benefits Solutions	Fidelity Investments
CEO	Financial Finesse
Financial Consultant	First American Investment Services
Annuity Product Mgr	First Command
Manager, Sales Support Team	First Command
Director, VAIO Sales	Franklin Templeton
Head of Institutional Canada	Franklin Templeton

Head of Investment-Only Division- U.S.	Franklin Templeton
Vice President, DC Strategy	Franklin Templeton
Director, Product Development	Genesis Financial Development Inc.
Senior Business Strategy Analyst	Genworth Financial
Senior Product Analyst	Genworth Financial
Actuary	GGYAXIS
Director, Retirement Programs	Glencore Canada Corporation
Private Wealth Advisor	Goldstein & Associates
Attorney	Goodwin Procter LLP
Assistant Vice President	Great American Insurance Group
Assistant VP - Product Development	Great American Insurance Group
Assistant Vice President, Wealth Management, Product Marketing	Great-West Life
Associate Manager Wealth Manager Product Marketing	Great-West Life
Vice-President, Sales & Marketing, Group Retirement Services	Great-West Life
President	Greenwald & Associates
Research Director	Greenwald & Associates
2nd Vice President	Guardian Life
Actuary	Guardian Life
Assistant Vice President	Guardian Life
Sr. Competitive Intelligence Analyst	Guardian Life
VP, Head of Operations	Guardian Life
National Relationship Manager	Guardian Retirement Solutions
Manager Retirement Product Development	GuideStone Financial Resources
Vice President National Sales	Horace Mann
VP Actuary Product Mgt.	Horace Mann
Assistant Professor of Marketing	IDC Herzliya
Managing Director	Imprint
CEO	Income Discovery
Vice President, Group Savings and Retirement	Industrial Alliance
Product Accounting Manager	Industry Fund Services
Sr. Business Development Manager	Infosys McCamish Systems
SVP Retirement Services	Infosys McCamish Systems
Head of Competitive Intelligence and Reporting	ING
Head of Pricing	ING
EVP, Engineering & CIO	Insurance Technologies
VP, ForeSight Product Management	Insurance Technologies
Contributing Editor	InsuranceNewsNet, Inc.
Reporter	Investment Executive
Managing Director	J.P. Morgan
Director, Financial Institutions	Janus

Vice President, Managing Director Financial Institutions	Janus Capital Group
VP, Personal Financial Services	John Hancock
Director, Business Development	LearnVest
Director, Product Development	Legacy
Director, Life Insurance Vertical	LexisNexis
VP & GM Life Vertical	LexisNexis
Vice President, Independent Channel	Liberty Life Assurance Company of Boston
President	LIDP Consulting Services
Sale Representative	LIDP Consulting Services
Sales Executive	LIDP Consulting Services
Assistant Research Director	LIMRA
Assistant Research Director	LIMRA
Associate Analyst	LIMRA
Associate Research Consultant	LIMRA
Associate Research Director	LIMRA
AVP	LIMRA
Client Relations Manager, Retirement Clients and Products	LIMRA
Client Relationship Director	LIMRA
Client Relationship Director	LIMRA
Corporate Vice President and Director	LIMRA
Director, Conferences	LIMRA
Director, Public Relations	LIMRA
International Conference Intern	LIMRA
Meeting Planner	LIMRA
Multimedia LIMRA	LIMRA
Multimedia Support Assistant	LIMRA
Research Communications Manager	LIMRA
Senior Conference Coordinator	LIMRA
Vendor Relations	LIMRA
Vice President	LIMRA
Senior Meeting Planner	LIMRA and LOMA
Managing Director	LIMRA LOMA Secure Retirement Institute
Associate Managing Director	LIMRA Secure Retirement Institute
Associate Managing Director	LIMRA Secure Retirement Institute
Senior Analyst	LIMRA Secure Retirement Institute
Senior Business Analyst	LIMRA Secure Retirement Institute
President and CEO	LIMRA, LOMA, and LL Global
Actuary	Lincoln Financial Group
Competitive Intelligence Analyst	Lincoln Financial Group
Product Analyst	Lincoln Financial Group
Senior Product Analyst	Lincoln Financial Group
Variable Annuity Product Analyst	Lincoln Financial Group

Vice President	Lincoln Financial Group
VP of Sales Delivery	Lincoln Financial Group
Actuarial Consultant	Lincoln Life
AVP Member Solutions	LOMA
Editor, Resource	LOMA
Managing Director, LOMA Secure Retirement Institute	LOMA
Meeting Planner	LOMA
Member Solutions	LOMA
Member Solutions Sales Associate	LOMA
Second Vice President	LOMA
Senior Associate	LOMA
Senior Associate	LOMA
Senior Associate	LOMA
Senior Associate	LOMA
Senior Associate	LOMA
Senior Associate-Education & Training	LOMA
Senior Vice President	LOMA
Senior Vice President	LOMA
Sr Associate, Education and Training	LOMA
Manager, Product Development and Pricing	London Life
AVP & Head of Guaranteed Investment Products	Manulife Financial
Director	Manulife Financial
Director of Variable Annuities	Manulife Financial
Director of Client Development	MarketBridge
AVP Product Management	MassMutual
AVP Strategy & Competitive Intelligence	MassMutual
AVP, Business Development	MassMutual
Competitive Research Consultant	MassMutual
National Government Practice Leader	MassMutual
Corporate Vice President - Product Solutions Management	Max Life Insurance
Sr. Expert	McKinsey & Company
Advanced Sales Consultant	MetLife
Market Research Consultant	MetLife
Regional Director Advanced Sales	MetLife
Senior Market Research Consultant	MetLife
VP	MetLife
Consulting Actuary	Milliman, Inc.
Financial Risk Management, Practice Leader	Milliman, Inc.
Manager, Advanced Sales	Modern Woodmen of America
Senior Product Analyst	Modern Woodmen of America
Managing Principal	Montgomery Retirement Plan Advisors
Partner	Morgan Lewis & Bockius

Product Performance Director	Mutual of Omaha
Regional Sales Manager	Mutual of Omaha
Marketing Manager	National Life Group
Associate Vice President	Nationwide Financial
Associate Vice President	Nationwide Financial
AVP Annuity Brand Marketing	Nationwide Financial
Product Director	Nationwide Financial
Product Manager Sr Specialist	Nationwide Financial
Senior Consultant	Nationwide Financial
Senior Director, Actuary	Nationwide Financial
SVP	Nationwide Financial
Vice President	Nationwide Financial
Senior Vice President	Nationwide Insurance
Analyst	NEOS LLC
CEO & Managing Partner	NEOS LLC
Senior Principal	NEOS LLC
Senior Principal	NEOS LLC
Advanced Income Solutions	New York Life
Corporate Vice President	New York Life
Corporate Vice President	New York Life
CVP	New York Life
Director	New York Life
Director & Actuary	New York Life
Director, Annuity Marketing	New York Life
Director, Annuity Marketing	New York Life
Director, Variable Annuity Product Development	New York Life
Managing Director	New York Life
Marketing Manager	New York Life
Product Specialist	New York Life
Senior Associate	New York Life
Variable Product Management	New York Life
Assistant Director - Annuities	Northwestern Mutual
Compliance Consultant	Northwestern Mutual
Director - Annuity Customer Services	Northwestern Mutual
Director, Annuities	Northwestern Mutual
Marketing Consultant	Northwestern Mutual
Media Relations	Northwestern Mutual
Wealth Management Advisor	Northwestern Mutual
Principal	Novarica
VP, Divisional Sales Manager	Ohio National
2nd VP, Annuity Product Management	Ohio National Financial Services
Actuarial Coordinator, Annuity Product Development	Ohio National Financial Services
Vice President, Retirement Plan Services	Ohio National Financial Services

Manager, Annuity Administration	Ohio National Life
Product Manager	OneAmerica Financial Partners
Senior Associate Actuary	OneAmerica Financial Partners
Vice President	OneAmerica Financial Partners
Vice President, Product Development	OneAmerica Financial Partners
Assistant Vice President	Pacific Life
AVP, Product Development	Pacific Life
Director & Actuary, ISP Product Design	Pacific Life
Director and Actuary	Pacific Life
Field Vice President	Pacific Life
Senior Advanced Marketing Consultant	Pacific Life
SVP, Product Design	Pacific Life
Vice President, Marketing	Pacific Life
Actuary	Penn Mutual
Manager Competitive Information	Penn Mutual
Second VP	Phoenix
Pricing Actuary - Annuity Products	Physicians Mutual
Executive Vice President, Account Manager	PIMCO
CEO	PRI Pensionsgaranti
Assistant Vice President	Principal Financial Group
AVP & National Practice Leader	Principal Financial Group
Competitive Intelligence	Principal Financial Group
Executive Advisor	Principal Financial Group
Marketing Strategist	Principal Financial Group
Product Manager	Principal Financial Group
Sr. Research Analyst	Principal Financial Group
Chief Global Economist	Principal Global Investors
Vice President Strategic Planning & Business Development	Principal International, Inc.
2nd Vice President	Protective Life
2nd Vice President	Protective Life
AVP - Market Intel	Protective Life
AVP Product Marketing	Protective Life
Product Development Program Management	Protective Life
VP, Product Development	Protective Life
Director, Platform Strategy	Prudential
Senior Analyst	Prudential
Vice President	Prudential
VP	Prudential Annuities
Vice President, National Accounts	Prudential Retirement
Market Research Specialist	Prudential Retirement
Vice President	Prudential Retirement
Managing Director	P-Solve
Professor	Purdue University



Head, Wealth Products	RBC Insurance
Editor	Retirement Income Journal
Reporter	Reuters
VP Annuity Product Development	RiverSource Life
VP Annuity Product Development & Management	RiverSource Life
Channel Management	S&P Dow Jones Indices
Director - Sales	S&P Dow Jones Indices
Director of Sales	S&P Dow Jones Indices
Director, Sales	S&P Dow Jones Indices
Global Head of Insurance	S&P Dow Jones Indices
Managing Director, Channel Management	S&P Dow Jones Indices
Vice President	S&P Dow Jones Indices
Vice President	Sagikor Life Jamaica
President, Annuities	Sammons Financial Group
Senior Competitive Analyst	Sammons Financial Group
Director of Business Development	se <sup>2</sup>
Manager Business Development	se <sup>2</sup>
Vice President Business Development	se <sup>2</sup>
Vice President Strategic Development	se <sup>2</sup>
Development Manager	SECU Life
Senior Vice President	SECU Life
Annuity Product Consultant	Securian Financial Group
Director, Individual Annuity Product Development	Securian Financial Group
Manager, Annuity Marketing	Securian Financial Group
Second Vice President and Actuary	Securian Financial Group
Vice President	Securian Financial Group
Vice President, Retirement Plans	Securian Financial Group
Director, Retirement Technology	Securian Retirement
Assistant Vice President	Security Benefit
AVP and Actuary	Security Benefit
Vice President, Product Development	Security Benefit
VP	Security Benefit
CIO	Sheridan Road Financial
Director of Finance & Administration	Simple Truth
Managing Partner	Simple Truth
Managing Director	Society of Actuaries
Managing Director of Research	Society of Actuaries
Professional Development Manager	Society of Actuaries
Staff Fellow - Retirement Systems	Society of Actuaries
President	Soleares Research LLC
Manager Annuity Tax and Technical Services	Southern Farm Bureau
Director, Product Development	SSQ Financial Group

VP Marketing	SSQ Financial Group
Associate Vice-President, Business Solutions	Standard Life
AVP, Spread Business	Standard Life
Actuarial Analyst	State Farm Insurance
Director	State Farm Insurance
Manager	State Farm Insurance
Mutual Funds Analyst	State Farm Insurance
Sales	StoneRiver
Sr. Business Development Executive	StoneRiver
Senior Manager	Sumitomo Life Insurance Company
Editor	Summit Professional Networks
Editor	Summit Professional Networks
Director, Product Design and Management	Sun Life Financial
Director, Wealth Product Development	Sun Life Financial
Product Manager	Sun Life Financial
Vice President, Client and Business Development, Group Retirement Services	Sun Life Financial
Marketing Manager	SunGard
Vice President	SunGard
Managing Partner	SVM Business Advisory, Inc.
SVP, Head, Longevity North America	Swiss Re
AVP, Director of Product Management	Symetra
VP Retirement Product Management	Symetra
Assistant Vice President	T. Rowe Price
Head, Retirement and College Products	T. Rowe Price
Market Research Manager	T. Rowe Price
Retirement and College Product Development	T. Rowe Price
Vice President	T. Rowe Price
Investor Marketing Manager	TD Ameritrade
Professor	Texas Tech University
Actuarial Analyst	The Nyhart Company
Actuary	The Nyhart Company
Attorney	The Nyhart Company
CEO	The Nyhart Company
Asst VP Retirement Plan Services	The Standard
Director, RP Plan Services Operations	The Standard
VP RP Plan Services	The Standard
Director	Thrivent Financial
Actuary	TIAA-CREF
Director, Product Management	TIAA-CREF
Managing Director Institutional Product & Pricing Management	TIAA-CREF
Senior Director Employee Services	TIAA-CREF
VA Product Manager	Transamerica

VP & Actuary	Transamerica Life Insurance Company
Retirement Product Manager	Transamerica Retirement Solutions
Vice President-Not For Profit Markets	Transamerica Retirement Solutions
VP Product Development	Transamerica Retirement Solutions
The Charles R. Walgreen Distinguished Service Professor of Behavioral Science and Economics	University of Chicago Booth School of Business
Prod Mgmt Director	USAA
Prod Mgmt Director	USAA
Prod Mgmt Manager	USAA
Product Mgmnt Director	USAA
Manager- Life & Annuities Software	ValueMomentum Inc
Manager	Vanguard
Product Manager	Vanguard
Project Manager	Vanguard
Business Development Manager	Venture Solutions
Strategic Account Director	Venture Solutions
Relationship Manager	Wealth Management Systems, Inc
VP, Business Development	Wealth Management Systems, Inc.
EVP, Director of Institutional Retirement & Trust	Wells Fargo
SVP Reinsurance	Wells Fargo
SVP, Director of Annuities	Wells Fargo
Vice President, Product Manager	Wells Fargo
VP & Senior Actuary	Wells Fargo
VP, Senior Actuary	Wells Fargo Reinsurance
Director, Product Development & Implementation	Western & Southern Financial Group
Product Director	Western & Southern Financial Group
VP, Product Management	Western & Southern Financial Group
Actuary	Western & Southern Life
Director of Programs	WISER
President	Woodmen Financial Services
Executive Vice President	Working in Support of Education
Director of Business Development	XTRAC Solutions
Director Sales	XTRAC Solutions