

Retirement Industry Conference

April 11 - 13, 2018

Chicago Marriott Downtown Magnificent Mile, Chicago, IL

Conference 2018



Building
Opportunities
for the Future

Understand how new digital technologies can transform financial planning 

Learn what plan sponsors wish you knew about the issues that affect them 

Navigate the ever-evolving retirement industry landscape 



Building Opportunities for the Future

Where are we now? And where do we go from here? Which strategies will win the day? A mix of industry veterans and future leaders attend this event to share ideas, best practices, and listen to the latest thinking on what will move the industry forward. You will hear how others are navigating the ever-evolving retirement industry landscape.

Consumer demand for guaranteed lifetime income will remain strong. The retirement industry must work diligently to ensure that consumers are aware of the longevity, health care, and other risks they face in retirement, that they adequately protect themselves against those risks, and that they are made aware of the solutions that can provide that protection.

Conference partners, The LIMRA LOMA Secure Retirement Institute and the Society of Actuaries (SOA) are dedicated to providing you with a first-rate conference experience that will cover the very latest in industry insights and strategies to meet the retirement challenge.

Join us in April in Chicago at the 2018 Retirement Industry Conference to network with your peers and leading industry experts as we build opportunities for the future.

General Session Highlights

The Future of Financial Planning: Personalized Finance in the Digital World

(1.0 EA Non-Core Credit Hour)



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

Acclaimed behavioral economist Shlomo Benartzi will reveal how we can apply the latest behavioral economics research to important financial decisions. After briefly summarizing the lessons of Save More Tomorrow, the nudge he developed with Nobel Laureate Richard Thaler that has boosted the savings rates of more than 15 million Americans, Benartzi will shift to the future, looking at how new digital technologies can transform financial planning. In particular, he'll outline a set of new "personalized finance" principles that can measure the biases and preferences that shape our financial lives. Thanks to companies like Amazon and Netflix, consumers have come to expect a high degree of personalization. It's time for the financial industry to catch up and offer personalized solutions.

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



MARIA FERRANTE-SCHEPIS

*President
Maddock Douglas, Inc.*

It's no surprise to those of us in the financial services industry that the retirement industry is rapidly changing in many ways. Common themes include longevity, technology, regulation, and the economy. However, the bigger questions involve identifying the ways those factors will impact our business and steps we can take to shape our role in the future. Maria Ferrante-Schepis will offer her perspective on how to answer those questions for the industry and more specifically for your company. Her intention is to help you find your unique and ownable corner of the industry among an abundance of opportunities to innovate, grow, and serve current and new customers.

Inside Washington: The Policy and Politics of Financial Services



TOM CRAWFORD

*Senior Managing Director,
Strategic Communications
FTI Consulting*

Come hear a Washington insider's view on the new political landscape and its effects on the retirement industry. With expertise in corporate governance, retirement security, and tax policy, Crawford will discuss how government, public policy, markets, and globalism have converged to impact everyday Americans and financial services consumers.

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.*

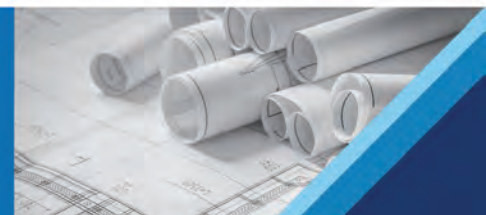
LISA DESANTO

*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*

For most Americans, retirement savings happens in the workplace. Plan sponsors are uniquely positioned to understand and influence the savings behavior of millions of U.S. workers. Learn about the issues and trends that affect plans sponsors as they navigate the challenges of today's employee benefit programs. A panel of plan sponsors will share their perspectives on topics like financial well-being, plan design, HSAs, retirement income, and employee communication. Learn what sponsors wish you knew.



Program Overview

WEDNESDAY, APRIL 11

REGISTRATION — 1:00 to 6:30 p.m.

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

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

THURSDAY, APRIL 12

REGISTRATION — 7:00 a.m. to 5:00 p.m.

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

GENERAL SESSION — 8:00 to 10:00 a.m.

GS1A: The Future of Financial Planning: Personalized Finance in the Digital World

Sponsored by Voya

SHLOMO BENARTZI, Ph.D.

Professor and Co-Founder
Behavioral Decision-Making Group
UCLA Anderson School of Management

Introduced by:

RICHARD MASON

Senior Advisor
Voya Behavioral Finance Institute for Innovation

GS1B: Plan Sponsor Confidential

KRISTINE 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

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

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

LUNCHEON — 11:45 a.m. to 1:00 p.m.

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

Sponsored by CANNEX Financial Exchanges

This luncheon and interactive session will focus on current retirement topics impacting the Canadian market and is open to all attendees interested in Canadian-specific issues. Pre-registration is required.

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

MOVING BREAK — 2:00 to 2:15 p.m.

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

REFRESHMENT BREAK — 3:15 to 3:45 p.m.

Sponsored by Hannover Re

GENERAL SESSION — 3:45 to 4:45 p.m.

GS2: The Retirement Industry: What Role Will You Play In the Future?

MARIA FERRANTE-SCHEPIS

President
Maddock Douglas, Inc.

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

Sponsored by EY

ALL-CONFERENCE EVENING EVENT — 6:00 to 8:00 p.m. —
Chicago Sports Museum

Sponsored by S&P Dow Jones Indices

FRIDAY, APRIL 13

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

GENERAL SESSION — 8:00 TO 9:00 A.M.

GS3: Inside Washington: The Policy and Politics of Financial Services

TOM CRAWFORD

Senior Managing Director, Strategic Communications
FTI Consulting

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

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

REFRESHMENT BREAK — 10:30 to 10:45 a.m.

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

CONFERENCE ADJOURNS — 11:45 a.m.

Conference

Distribution of Conference Sessions

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



Concurrent Sessions

WEDNESDAY, APRIL 11

4:00 to 5:00 p.m.

1.1 Taking On the “D” Word

Disruption is among today’s most misused buzzwords. People frequently use it to describe innovations regardless of their impact, as well as anything that presents even a mild challenge to an organization. But disruption is more than that. Disruptors can severely impact revenue or have a crippling effect on a business or an entire industry. Join this thought-provoking interactive discussion to learn what forces truly pose the greatest disruptive threats to the retirement industry and what you can do to not only guard against them, but go on the offensive and even be the disruptor.

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

1.2 Technology in Workplace Retirement Plans

This session explores the intersection of data technology and public policy in workplace retirement programs.

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

1.3 Blockchain in Insurance

Across all segments of the financial industry, the potential for blockchain technology is generating a lot of attention. Most financial institutions are evaluating the technology to determine how they can use it to improve cybersecurity, automation, customer service and achieve competitive advantage. As part of the LIMRA partnership with the Institutes, several LIMRA-member firms have joined the Institutes’ RiskBlock Alliance to develop industry-level blockchain solutions. This session, designed for “non-technical” people, will provide a basic understanding of blockchain technology and discuss current applications in development as well as future applications being considered.

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

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

Asia is going through a rapid demographic transition. Not only is its population aging, it is aging at a speed never seen before. LIMRA-SOA jointly commissioned an Asia wide research to study the current state and future opportunity of the retirement markets in Asia. Attendees will hear the product features consumers have identified in the study, providing insight for our industry to help address the looming retirement funding (public and private) gap. One size does not fit all. The right product for the right product segment, through the right channels will also be unveiled.

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

THURSDAY, APRIL 12

10:30 to 11:45 a.m.

2.1 Annuities: The More Things Change, the More They Stay the Same

The individual annuity market has experienced significant change in the past few years, creating a cloud of uncertainty in the future. Amidst all of this change, this session will look through the lens of the consumer, providing a strategic viewpoint into who is buying annuities, and who is not.

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

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

Hear key results of two related research studies implemented for the Society of Actuaries. The 2017 SOA Retirement Risk Survey, ninth in the biennial series, focused on key financial concerns, housing issues, financial wellness, and long-term care risk. The Late in Life Study was comprised of 62 in-depth interviews of people ages 85 and over on how they handle their finances and their perception of their financial situation. This research provides deep insights into how people assess and deal with financial risks and financially manage through retirement.

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

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

“Financial Wellness”...it’s something everyone’s talking about; but, on many levels, it remains an elusive concept. This session will shed light on what financial wellness is, what it means for employers and individuals, and what providers and other stakeholders are doing to promote it.

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

2.4 Product: The View from the Other Side!

This session will focus on how retirement industry experience in the product development/actuarial world can be successfully applied in the sales and marketing world. The two speakers both have expertise in both environments.

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

1:00 to 2:00 p.m.

3.1 Annuity Product Trends and Issues

Experts will discuss the issues and trends seen in the annuity market from a product development perspective. We will discuss new annuity product designs and their financial treatment. Join us for a review of recent market activity, and learn the impact of new industry regulations and macro-economic changes on annuity product offerings. Covered products include fixed, fixed indexed, variable, income, and structured annuities. At the conclusion of the session, attendees will be able to identify new types of product offerings and trends, determine considerations when evaluating their current product portfolios, and understand the current climate for new annuity product development.

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

3.2 Small Business Insights

Small employers are, in many ways, a “last horizon” for workplace plan formation — and many of them are being challenged to offer payroll deduct retirement plans to their employees. Learn about the forces and factors at work in this key marketplace.

THOMAS KRET, CIMA, CRPS, Senior Retirement Plan Consultant, UBS Financial Services, Inc.; Additional Presenters TBA;
Moderator: MARK PARACER, FLMI, FSRI, Assistant Research Director, LIMRA Secure Retirement Institute

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

Advisors’ practices are constantly shaped by both internal and external dynamics. These forces cause advisors to remold their practice models and upgrade their value propositions to clients. Organizations serving advisors must effectively align their products and services to explore and engage with desired advisor segments. This session will share early findings from the LIMRA-Ernst & Young advisor study on evolving advisory practice models regarding retirement, the drivers of productivity, and the services and support advisors demand from their organizational partners.

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

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

Did you know that in the U.S., insurance makes up just 11 percent of the total amount needed to fund aging people’s needs? To make our solutions more relevant to seniors, we need to better understand their widely varying needs and how they make decisions. Learn about better ways to segment the market, how to build winning solutions and what will make products more likely to be purchased. Leave with insights and fresh ideas from Swiss Re’s consumer research.

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



2:15 to 3:15 p.m.

4.1 What Do RIAs Really Think of Annuities?

RIAs and annuities may be an unlikely pairing, but it can be an effective one. With continued growth in the RIA channel and movement to fee-based models, there is an opportunity in this market. RIAs themselves will discuss how annuities can complement solutions offered to clients, and panelists from various aspects of the RIA channel will share how annuity providers should (and should not) approach this growing market.

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

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

Consultant influence on plan sponsor actions is clear. Understanding how retirement plan consultants view the retirement industry today and where they see significant change, is essential for retirement service providers of all types. Hear a candid, practical discussion with thought leaders in retirement consulting, which could well shape your thinking in 2018.

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

4.3 InsurTech Developments in the Retirement Industry

InsurTech is changing the insurance industry with new perspectives, technologies and customer-centric approaches to doing business. This session will highlight some of the entrepreneurs bringing exciting new innovations to the aging and retirement space. They will provide backgrounds on their businesses, perspectives on partnering with established companies, and their outlooks on the future opportunities in this space.

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

4.4 Trends in Workplace Retirement

(1.2 EA Non-Core Credit Hours)

This interactive session begins with Brightwork Partners' Merl Baker discussing DC trends from a distribution perspective, then builds with interactive audience participation with discussion of driving trends and interactive polling about what's important to you.

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

FRIDAY, APRIL 13

9:30 to 10:30 a.m.

5.1 Longevity Lifestyle Preparation: How to Help Clients Prepare to Live Well to and Through Retirement

(1.2 EA Non-Core Credit Hours)

We are living longer and spending more time in retirement than ever before. According to the Society of Actuaries Longevity Illustrator, for a 65-year-old couple in average health, there is a 50 percent chance that one will live until 90 years old. Great-West Financial is collaborating with the Stanford Center on Longevity to bring you research and data on how to incorporate longevity planning into the way we do business. Specifically, we will present the three tenants of long life: mind, mobility, and money with an emphasis on how retirement income strategies can fit into clients' portfolios.

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

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

Times are changing in the annuity products space. Gone are the days of cookie cutter products and flat sales. What are the product designs that are benefiting most from the tsunami of baby boomer retirement funds? This session will take a deep dive into fixed indexed annuities and variable annuities with a particular focus on risk control frameworks for variable annuity volatility management, products that are creating a winning proposition for carriers and consumers.

BRYAN PINSKY, 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

Conference

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

Hear an update on ERISA litigation in the 401(k) and 403(b) worlds. Attorneys will discuss both the status of existing situations and best practices to consider in avoiding litigation in the first place.

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

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

While the media focuses on the lack of retirement preparedness of Americans, another significant issue is brewing – many affluent retirees are not spending down their portfolios, and are unnecessarily constraining spending to the point where they are living well below their means. Our industry needs to do a better job aiding these retirees and helping fight this other retirement crisis. Attend this session to learn about what might be causing this behavior, the role behavioral biases may play, and what products and solutions advisors can utilize to help retirees confidently spend more and improve their quality of life.

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

10:45 to 11:45 a.m.

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

This session will discuss three important actuarial standards of practice (ASOP) exposure drafts titled: Pricing of Life Insurance and Annuity Products; Modeling; and Setting Assumptions; recently proposed by the Actuarial Standards Board. Focused topics of discussion will address what these newly proposed ASOPs mean for the actuary. At the conclusion of the session, attendees will understand the overview of these ASOPs, identify opportunities to implement newly proposed guidance in their organizations; and evaluate their own pricing, models, and assumption setting processes to determine if there are existing processes that would benefit from improvement.

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

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

Annuity placements are an increasingly attractive and popular form of pension de-risking. This session overviews the annuity placement process from the perspectives of both the plan sponsor and annuity provider with panelists from both areas. Drawing on recent case studies and current trends, the session will cover a wide range of issues that are impacting annuity placements including data, mortality, state of issue, benefit types, transition, contract structures such as 'split deals', assets in kind, and other investment considerations.

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

6.3 Focus on Governmental Plans

Government market specialists examine the current state of government DC and discuss any changes they expect to see in the market over the next few years.

GLENN SHERMAN, Vice President, Retirement Plans, ICMA-RC;
Moderator: RYAN SCANLON, Associate Research Analyst, LIMRA Secure Retirement Institute

CONTINUING EDUCATION INFORMATION

Sessions qualifying for Enrolled Actuary credits are noted. While the SOA recommends these sessions to satisfy continuing education credit for Enrolled Actuaries, the final decision as to meeting this requirement rests with the Joint Board for the Enrollment of Actuaries. For information on SOA CPD Credit and Continuing Education Credit – U.S. Qualification Standard, please visit the Retirement Industry Conferences pages on the SOA website: www.soa.org.

The conference partners, in conjunction with The Society of Financial Service Professionals, are pleased to inform you that attendance at any of the sessions will qualify interested individuals for continuing education credits for the Professional Recertification Program.



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Conference

Conference Details and General Information

TO REGISTER

Register by March 12 and Save!

REGISTRATION FEES

Early Registration Rates (Register by March 12, 2018):

LIMRA, LOMA, and SOA Members: \$1,250

Non-member: \$ 1,875

Standard Rates (After March 12, 2018):

LIMRA, LOMA, and SOA Members: \$1,450

Non-member \$ 2,075

REGISTER ONLINE

www.limra.com/conferences

www.loma.org/events

www.soa.org

Meeting Attire: The dress code for this conference is business casual.

GROUP DISCOUNT

If five (5) or more individual employees from the same member company register for this meeting, each individual registrant may take advantage of a group registration discount of \$100. This discount applies only to people registering at the full conference rate. See the online registration form for complete details.

HOTEL INFORMATION



Chicago Marriott Downtown Magnificent Mile

540 North Michigan Avenue
Chicago, IL 60611

Reservations by phone: 1.312.836.0100 (Mention Retirement Industry Conference)

Reservation Link:

<https://aws.passkey.com/event/49284508/owner/1361/home>

Make your reservations by **March 12, 2018** in order to receive the group rate of \$269.00 single/double (plus applicable sales taxes). Requests after March 12 will be accepted based on rate and space availability. Hotel rates will increase after the cut-off date or when the meeting room block sells out, whichever comes first. Make your reservations early to be able to receive our discounted rates.

About the Associations

The **LIMRA LOMA Secure Retirement Institute** provides comprehensive, unbiased research and education covering all aspects of the retirement industry. It also offers a forum for senior leaders across the financial services retirement landscape to identify and explore the challenges Americans face surrounding retirement. Secure Retirement Institute's goal is to spur innovation and broaden industry collaboration to help improve retirement readiness and promote retirement security.



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