2022 Retirement Industry Conference
May 11th- May 13th, 2022
Boston Park Plaza Hotel, MA

Member Company / Industry Speaker
Request for Proposal

This important conference covers the latest strategic, sales, product, operations and administration, marketing and distribution trends as well as regulatory issues that impact the retirement industry. Everyone from DC plan services managers to retail-focused annuity product actuaries will find value in this event.

The LIMRA LOMA Secure Retirement Institute and the Society of Actuaries promise to deliver highly relevant and present-day focused content. Come, participate, and network with your peers.

Who Attends

Professionals across the spectrum of the retirement industry including product, marketing, distribution, and strategy for both retail and institutional markets. The conference draws leaders across the industry focused on growing and serving the annuity, investment, and workplace savings businesses.

Request for Proposals (RFP) for speaking opportunities are currently being solicited. RFP Guidelines and Criteria can be found below.

Conference highlights and logistics:

Date:	May 11-13, 2022
Location:	Boston, MA
RFP due:	March 1, 2022
Program Announcement:	March 30, 2022

Guidelines & Criteria

Eligibility

Financial Services Industry Leaders that submit session proposals no later than the RFP due date.

RFP Due

5:00 PM Eastern US time on 03/01/2022

Contact

Send your Proposal to Marvin Jones via email at jonesm@loma.org

Evaluation Team

Our team will evaluate each proposal with the goal of developing a well-balanced and relevant program for our attendees.

Topics:

Share your insights on a range of Retirement Topics including (but not limited to):

- Consumer education for annuities w/in 401k space
- Fee Based Distribution Products
- DEI Topic (Workforce, Product Development)
- Annunity Target Date Portfolio Approaches
- Differentiation of Record Keepers
- Compliance topics – 84-24, 2020-2, DOL
- Robo vs Advisor Services
- Innovation within the Retirement Vertical
- PEP Market Updates
- Cyber Security / Fraud

Presentation Format

- 60 minute presentation; includes Question and Answer period
- Presentation would be informational rather than promotional and must be provided for review 30 days in advance of event

Submission Requirements

- Company
- Session Title
- Proposed Speaker and Bio
- Description of Presentation
- Session Take-aways
- Contact Information

Additional Notes

If Speaker is from a Financial Services Provider :

- **No** product/service/company specific material during the program session
- Company collateral **may not** be distributed the program session

Questions

For questions, please contact Marvin Jones , LOMA at 770-984-6459 or jonesm@loma.org