

DOL/Treasury Lifetime Income Public Hearing Agenda

A live webcast of the hearing is available on EBSA's Web site at www.dol.gov/ebsa

September 14, 2010

9:00 a.m. — Opening Remarks

9:15 a.m. — Panel One

- ◆ Jan M. Jacobson, American Benefits Council
- ◆ David L. Wray, Profit Sharing/401k Council of America
- ◆ Allison R. Klausner, representing The ERISA Industry Committee
- ◆ Kevin T. Hanney, CFA

10:15 a.m. — Panel Two

- ◆ Karin S. Feldman, AFL-CIO
- ◆ Josh Shapiro, National Coordinating Committee for Multiemployer Plans

11:00 a.m. — Break

11:15 a.m. — Panel Three

- ◆ Jason K. Bortz, representing Committee of Annuity Insurers
- ◆ Christine Marcks, Prudential Retirement

11:45 a.m. — Panel Four

- ◆ Rebecca Davis, Pension Rights Center
- ◆ Amy K. Matsui, National Women's Law Center
- ◆ Cindy Hounsell, Women's Institute for Secure Retirement

12:45 p.m. — Lunch

1:45 p.m. — Panel Five

- ◆ Elizabeth L. Heffernan, Fidelity Investments
- ◆ Edmund Murphy, Putnam Investments
- ◆ Bob Collie, Russell Investments
- ◆ Paul Schott Stevens, Investment Company Institute

2:45 p.m. — Panel Six

- ◆ John M. Vine, Covington & Burling
- ◆ Brooke Worden, Weber Shandwick
- ◆ Tracey E. Flaherty, Natixis Global Asset Management

3:30 p.m. — Break

3:45 p.m. — Panel Seven

- ◆ Paul Van Heest, TIAA-CREF
- ◆ Robert E. Sollmann, Jr., MetLife
- ◆ Rhonda Elming, Aviva USA

4:30 p.m. — Panel Eight

- ◆ Donn Hess, J.P. Morgan Asset Management
- ◆ Christopher Jones, Financial Engines

5:00 p.m. — Adjourn For First Day

September 15, 2010

9:00 a.m. — Welcome

9:05 a.m. — Panel One

- ◆ Noel Abkemeier (representing) & Frank Todisco, American Academy of Actuaries
- ◆ Larry H. Goldbrum, The SPARK Institute
- ◆ Drew Carrington, representing Defined Contribution Institutional Investment Association

9:50 a.m. — Panel Two

- ◆ Eric S. Levy, Lincoln Financial Group
- ◆ Charles P. Nelson, Great-West Retirement Services
- ◆ Thomas Roberts, representing American Council of Life Insurers

10:35 a.m. — Break

10:50 a.m. — Panel Three

- ◆ Stephen Utkus, Vanguard
- ◆ Kelli H. Hueller, Hueller Companies
- ◆ Patricia Harris, representing Insured Retirement Institute

11:35 a.m. — Panel Four

- ◆ Pamela Perun, The Aspen Institute Initiative on Financial Security
- ◆ Ross A. Bremen, NEPC
- ◆ Tamara Burden, Milliman, Inc.
- ◆ Sheldon H. Smith, representing American Society of Pension Professionals & Actuaries

12:35 p.m. — Lunch

1:30 p.m. — Panel Five

- ◆ Mark J. Warshawsky, Towers Watson
- ◆ Dan Campbell, Hewitt Associates
- ◆ Martin A. Schmidt, Institutional Retirement Income Council

2:15 p.m. — Panel Six

- ◆ Kristi Mitchem & Trevor Oliver, State Street Global Advisors
- ◆ Mark Fortier, AllianceBernstein
- ◆ Greg Burrows, representing Financial Services Roundtable

3:00 p.m. — Panel Seven

- ◆ Robert J. Toth, Jr., Law Office of Robert J. Toth, Jr., LLC
- ◆ Benjamin J. Yahr, FSA, MAAA, CFA
- ◆ Professor Shlomo Benartzi, representing Allianz of America

3:45 p.m. — Closing Remarks