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. Hueler, Hueler 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