

The 2015 Retirement Industry Conference

New Retirement Realities – Strategies for Success



Attendees' Titles and Companies

Title	Company
Managing Director	AB
SVP and Counsel	AB
Consulting Actuary	Abbott Associates
Account Management	Accenture
Business Specialist	Accenture
Sales Director	Accenture
Software Sales and Marketing	Accenture
Director, Product Management	AIG
SVP - Individual Retirement Products	AIG
AVP Strategy & Business Development	Allianz Life
Vice President	Allianz Life
Relationship Manager	Allstate
Editor	ALM
VP Product Mgmt	American Equity Investment Life
Sr. Marketing Manager	Americo
2nd VP & Assoc Actuary	Ameritas
Product Research Analyst	Ameritas
VP Sales & Marketing	Ameritas
Partner	Arent Fox LLP
Director, Product Management	Athene
VP Product Management	Athene
Administrator	Auto-Owners Insurance
Lead Director	AXA Equitable
Lead Director	AXA Equitable
Senior Director & Actuary	AXA Equitable
Reporter	Bloomberg BNA
Reporter	Bloomberg BNA
CEO, UK Division	Canada Life Limited
CEO	CANNEX Financial Exchanges Limited
Consultant	CANNEX Financial Exchanges Limited
Director of Operations	Catholic United Financial
Corporate Education Manager	College for Financial Planning
Professor	Colorado State University
EVP of Business Development	Competiscan

Founder/CEO
Business Development Executive
Software Sales Executive
Associate Actuary
National Manager, Wealth
Senior Analyst
Vice President
Actuary
Director - Pricing & Product Management
Product Support Manager
Vice President, Wealth Management
Partner
Director
SVP Marketing & Sales
Vice President
Principal
Business Development Lifetime Income Solutions
Product Specialist
Senior Sales Executive
Director, Product Development & Marketing
Product Management Vice President
Product Manager
Actuarial Advisor
AVP Solution Design
Vice President
Principal
Senior Manager, Investments
Sales
Life Sales Development VP
Senior Manager, Wealth Manager
Vice President
Vice President, National Accounts
VP, National Accounts
Director
Vice President & Actuary
Washington Correspondent
Annuity Product Mgr
Associate Director
Assistant Vice President
VP- Head of Defined Contribution
Senior Managing Director
and Head of Americas, Government Affairs
Director, Product Development
Senior Vice-President
Assistant Vice President

Competiscan
Concentrix Insurance Solutions
Concentrix Insurance Solutions
Co-operators Life
Co-operators Life
Corporate Insight
Corporate Insight
CUNA Mutual Group
CUNA Mutual Group
CUNA Mutual Group
CUNA Mutual Group
Davis & Harman LLP
Deloitte
Delta Data
Dietrich and Associates, Inc.
Diversified Services Group, Inc.
DST Retirement Solutions
Edward Jones
Environ
Equitable Life of Canada
EquiTrust Life Insurance Company
Ernst & Young
Ernst & Young, LLP
EXL Services
EXLSERVICE
EY
Family Guardian Insurance Company
FAST
FBL Financial Group, Inc.
FG Capital Markets
Fidelity & Guaranty Life
Fidelity & Guaranty Life
Fidelity & Guaranty Life
Fidelity Investments
Fidelity Investments
Financial Advisor Magazine
First Command Financial Planning
First Command Financial Planning
First Investors Life Insurance Co.
Franklin Templeton
FTI Consulting

Genesis Financial Development Inc.
Gerber Life Insurance Company
Global Atlantic Financial Group

Managing Director	Global Atlantic Financial Group
Actuary	Great American Insurance Group
Assistant VP - Product Development	Great American Insurance Group
National Manager, Inside Sales, Wealth Management	Great-West Life
SVP Group Retirement Services	Great-West Life
Assistant Vice President	Greenwald & Associates
AVP	Greenwald & Associates
President	Greenwald & Associates
Project Coordinator	Greenwald & Associates
Senior Research Associate	Greenwald & Associates
Assistant Vice President	Guardian Life
Sr. Competitive Intelligence Analyst	Guardian Life
Vice President, Annuity Product Development	Guardian Life
Internal Sales Representative	Guggenheim Life and Annuity
Manager Retirement Product Development	GuideStone Financial Services
Actuary	Highland Consulting
International Consultant	IBM
Director	IGATE Technologies Inc
Group Manager	IGATE Technologies Inc
Vice President	IGATE Technologies Inc
Managing Director	Imprint
Consultant in Product Development	Industrial Alliance
Director, Individual Savings and Retirement Products	Industrial Alliance
Global Head of Business Development & Retirement Services	Infosys McCamish Systems
CEO	Insurance Technologies
Editor-at-Large	InsuranceNewsNet
Managing Director	Janus Capital
VP Financial Institutions	Janus Capital
Managing Director	Jefferies
VP & Pricing Officer	John Hancock
Advanced Markets Consultant	Lafayette Life
President	LIDP Consulting Services
Sales & Marketing	LIDP Consulting Services
Assistant Research Director	LIMRA
Associate Analyst	LIMRA
Associate Managing Director	LIMRA
Associate Research Consultant	LIMRA
Associate Research Director	LIMRA
AVP	LIMRA
AVP, Director Public Relations	LIMRA
Client Relations Manager	LIMRA
Corporate Vice President	LIMRA
Corporate Vice President, Communications	LIMRA
Data Scientist	LIMRA

Director Business Development	LIMRA
Director, Conferences	LIMRA
Meeting Planner	LIMRA
Multimedia	LIMRA
Research Director	LIMRA
Senior Analyst	LIMRA
Senior Conference Coordinator	LIMRA
Senior Vice President and Director, LIMRA Research	LIMRA
Vendor Relationship Mgr	LIMRA
Vice President	LIMRA
VP Developmental and Commercial Research	LIMRA
Senior Meeting Planner	LIMRA and LOMA
Managing Director	LIMRA LOMA Secure Retirement Institute
Managing Director	LIMRA LOMA Secure Retirement Institute
Assistant Vice President	LIMRA Secure Retirement Institute
Assistant Vice President	LIMRA Secure Retirement Institute
Corporate Vice President	LIMRA Secure Retirement Institute
Senior Business Analyst	LIMRA Secure Retirement Institute
President and CEO	LIMRA, LOMA, & LL Global
Accounting Assistant	Lincoln Financial Group
Actuary	Lincoln Financial Group
Associate Actuary	Lincoln Financial Group
AVP, Consumer Insights	Lincoln Financial Group
Manager Retirement Plan Services	Lincoln Financial Group
Market Research - Annuities	Lincoln Financial Group
Senior Technical Consultant	Lincoln Financial Group
Senior Vice President	Lincoln Financial Group
Specialist, Product Development	Lincoln Financial Group
Sr. Product Analyst	Lincoln Financial Group
SVP, Chief Marketing Officer, Retirement Plan Services Marketing	Lincoln Financial Group
VP Annuity Product Mgmt	Lincoln Financial Group
AVP Member Solutions	LOMA
Education	LOMA
Meeting Planner	LOMA
Member Solutions	LOMA
Member Solutions Sales Associate	LOMA
Professional Development Consultant	LOMA
Second Vice President	LOMA
Senior Associate	LOMA
Senior Associate	LOMA
Senior Vice President, Education & Training	LOMA
Sr. Vice President	LOMA

Associate Marketing Manager	London Life
Manager, Guaranteed Products	London Life
Advanced Planning Attorney	LPL Financial
Managing Principal -	Maddock Douglas, Inc.
Insurance & Financial Services Innovation	
President & COO	Maddock Douglas, Inc.
Director	Manulife Financial
Head of Guaranteed Investment Products	Manulife Financial
AVP Competitive Intelligence	MassMutual
Competitive Research Analyst	MassMutual
Competitive Research Consultant	MassMutual
Director, Product Management	MassMutual
Relationship Manager	MassMutual
Vice President-Marketing	MassMutual
Partner	Mercer
Advanced Sales Associate	MetLife
Advanced Sales Consultant	MetLife
Director of Marketing	MetLife
Market Research Consultant	MetLife
Marketing	MetLife
Regional Director Advanced Sales Center	MetLife
Vice President	MetLife
Vice President Product Development	Midland National
Managing Director - Rollover Solutions Group	Millennium Trust Company
Consulting Actuary	Milliman Inc.
Principal and Consulting Actuary	Milliman Inc.
Director	MIT AgeLab
Senior Associate	Modern Woodmen of America
Regional Sales Manager	Mutual of Omaha Investor Services
Futurist	n/a
Senior Product Director	NADART & Westpark
Vice President	National Life Group
AVP, Actuary	Nationwide
AVP, Product Development	Nationwide
Consultant, Competitive Intelligence	Nationwide
Director	Nationwide
Director of Financial Services	Nationwide
Marketing and Distribution Analytics	
Senior Vice President	Nationwide
CFO & VP	Nationwide Financial
Competitive Intelligence Specialist	Nationwide Financial
Vice President-Annuity and Innovation Team	Nationwide Financial
AVP, NRS Product Development	Nationwide Retirement Solutions
Managing Consultant	NEOS
Senior Principal	NEOS

Senior Principal	NEOS
Sr. Analyst	NEOS
Corporate Vice President	New York Life
Director	New York Life
Director	New York Life
Director & Actuary	New York Life
Managing Director, Head of Annuity Products	New York Life
Marketing Manager	New York Life
Senior Associate	New York Life
Senior Associate	New York Life
Senior Associate	New York Life
Tax Qualified Plans	New York Life
Assistant Director	Northwestern Mutual
Director Media Relations	Northwestern Mutual
Director, Retirement Market	Northwestern Mutual
Vice President, Research and Consulting	Novarica
Manager, Individual Annuity Administration	Ohio National Financial Services
Sales & Marketing Officer	Ohio National Financial Services
Senior Marketing Consultant	Ohio National Financial Services
Senior Vice President Institutional Sales	Ohio National Financial Services
Senior Vice President, Annuities Strategic Business Head	Ohio National Financial Services
VP, ONESCO Operations	Ohio National Financial Services
Chief Executive Officer	Old Mutual Bermuda
Director of Marketing, Retirement in Motion	OneAmerica
Field VP, Sales Development	OneAmerica
Product Manager	OneAmerica
Senior Associate Actuary	OneAmerica
Vice President	OneAmerica
Vice President	OneAmerica
VP Tax Exempt Sales	OneAmerica
Advanced Marketing	Pacific Life
Assistant Vice President	Pacific Life
AVP Product Development	Pacific Life
Director, Product Development	Pacific Life
Manager and Actuary	Penn Mutual Life
National Sales Internal Sales Desk Manager	Penn Mutual Life
President	Pfeifer Advisory LLC
Second VP	Phoenix Life
Vice President	Phoenix Life
Market/Product Specialist	Physicians Mutual
Benefits Consultant, Human Capital Practice	Planned Sponsor Council of America
AVP - Annuity Line Management	Principal Financial Group
Product Manager	Principal Financial Group
Product Research Analyst	Protective Life
Annuity Product Manager	Protective Life Corporation

Chief Market Strategist	Prudential
Market Intelligence Manager	Prudential
Sr. Mgr	Prudential
Vice President	Prudential
VP & Actuary, Modeling	Prudential
VP	Prudential Annuities
Director, Actuary	Prudential Financial
Vice President	Prudential Retirement
Actuary	Public Institution for Social Security
Global Distribution Associate	Putnam Investments
Strategic Relationship Manager	Putnam Investments
VP, Fixed Annuity Sales	Raymond James
Head, Wealth Products	RBC Insurance
COO	RCP Solutions
President	RCP Solutions
Editor and Publisher	Retirement Income Journal
VP Annuity Product Development	RiverSource Life Ins. Co.
VP Annuity Product Development & Management	RiverSource Life Ins. Co.
Head of Retirement Strategy - Retail Bank	Royal Bank of Canada
Principal	Rudolph Financial Consulting, LLC
Associate	S&P Dow Jones Indices
Director, Sales	S&P Dow Jones Indices
Global Head of Insurance	S&P Dow Jones Indices
Managing Director	S&P Dow Jones Indices
Senior Director	S&P Dow Jones Indices
Senior Director	S&P Dow Jones Indices
Vice President Market Development	S&P Dow Jones Indices
Assistant Professor	Saint Joseph's University
Director of Market and Competitive Intelligence	Sammons Financial Group
AVP, Business & Sales Development	Sammons Retirement Solutions
Alternative Investment	Samsung Life
Manager CPC Planning Team	Samsung Life
Senior Manager Alternative Sales Support	Samsung Life
Director Business Development	se2
Director Technology Solutions	se2
Manager Business Development	se2
SVP Business Development	se2
SVP Client Solutions/CRM	se2
Head of Personal Finances	SEB
Annuity Product Consultant	Securian Financial Group
Associate Actuary	Securian Financial Group
Director & Actuary, Retirement Plans	Securian Financial Group
Director, Individual Annuity Product Development	Securian Financial Group
Manager, Retirement Plan Technology	Securian Financial Group
Vice President and Actuary	Securian Financial Group

AVP and Actuary
 Vice President, Product Development
 President
 Managing Director of Research
 Sr. Professional Development Manager
 Staff Fellow - Retirement Systems
 President
 Head of Global Product Strategy
 Managing Director
 Actuarial analyst, Product development
 Vice-President, Group Savings & Retirement
 Director
 Strategic Analyst
 Supervisor
 Director, Product Design and Management
 Director, Product Development
 Product Manager, Fixed Payout Annuities
 VP, Client Relationship & Sales
 AVP - Emerging Markets & Market Intelligence
 AVP, Director of Product Management
 VP Retirement Products
 Legal Reporter
 Professor
 Advisor/Entrepreneur
 Chief Digital Officer
 Professor of Retirement Income
 Vice President
 Assistant Vice President, Client Relations
 Senior Relationship Manager
 AVP wealth and estate planning
 Actuarial Analyst
 Attorney
 CEO
 Director of Underwriting
 Actuary
 Dir Financial Planning
 Director, Product Management
 Senior Managing Director and Product Actuary
 Product Manager
 VP & Actuary, Annuity Product Development
 Director, Retirement Planning
 VP, Product Development
 Consulting Actuary
 Senior Advisor to the Secretary, and
 Deputy Assistant Secretary (Retirement and Health)

Security Benefit
 Security Benefit
 Security Benefit Life
 Society of Actuaries
 Society of Actuaries
 Society of Actuaries
 Soleares Research LLC
 SSgA
 SSgA
 SSQ Financial Group
 Standard Life
 State Farm
 State Farm
 State Farm
 Sun Life Financial
 Sun Life Financial
 Sun Life Financial
 Sun Life Financial
 Symetra
 Symetra
 Symetra
 Tax Analysts
 Texas Tech University
 The 401k Study Group
 The 401k Study Group
 The American College
 The American College
 The Argus Group
 The Argus Group
 The Cooperators
 The Nyhart Company
 The Nyhart Company
 The Nyhart Company
 The Standard
 TIAA-CREF
 TIAA-CREF
 TIAA-CREF
 TIAA-CREF
 Transamerica
 Transamerica
 Transamerica Retirement Solutions
 Transamerica Retirement Solutions
 Trinity Consulting Ltd
 U.S. Department of the Treasury

Assistant Director	U.S. Government Accountability Office
Senior Analyst	U.S. Government Accountability Office
Retirement Columnist	USA TODAY
Dir Product Mgmt	USAA
Product Management Director	USAA
Product Management Director	USAA
Product Manager	USAA
Head of Small Business Retirement Solutions	Vanguard Group
Manager	Vanguard Group
Manager	Vanguard Group
Project Manager	Vanguard Group
Product Director, LCM	Voya Financial
Senior Actuary	Voya Financial
VP Advanced Sales	Voya Financial
Managing Partner	Washington Financial Group
VP, Business Development	Wealth Management Systems, Inc.
VP, Business Development	Wealth Management Systems, Inc.
CEO	Wealthminder
Vice President	Wellington Management
Director of Retirement Strategy	Wells Fargo
Vice President	Wells Fargo
Actuary	Western & Southern Financial Group
AVP & Director Derivative Linked and Annuity Products	Western & Southern Financial Group
Product Director	Western & Southern Financial Group
SVP Insurance	WNS
Chief Sales and Marketing Officer	Xpertdoc Technologies, Inc.
Sales Executive	Xpertdoc Technologies, Inc.