2010 Conference Agenda

Wednesday, December 8, 2010

Start Time	End Time	Session	Speaker
4:00 PM	6:00 PM	Attendee sign-in and Exhibit Hall open to meet Sponsors	
6:30 PM	8:30 PM	Opening Reception Sponsored by SteelPath	

Thursday, December 9, 2010

Start Time	End Time	Session	Speaker
7:00 AM	8:00 AM	Breakfast Sponsored by ING	
8:00 AM	9:00 AM	Welcome and State of the Industry	**Fred Barstein** President & Executive Director, The Retirement Advisor University
9:00 AM	10:00 AM	Behavioral Finance and the Post-Retirement Crisis	**Professor Shlomo Benartzi** UCLA Anderson School of Management, Chief Behavior Economist – Allianz Global Distributors
10:00 AM	10:30 AM	Beverage Break Sponsored by ColumbiaManagement	
10:30 AM	11:45 AM	Best Practices in Prospecting and Closing	**Vince Giordano** (Moderator) - VP Sales, Securian Retirement **Jason Chepenik** - Managing Partner, Chepenik Financial **Jon Upham** - President, Sageview Advisory Group **Michael Coelho** - Director, Retirement Services InvestLinc Wealth Serv. **Tom Ruggie** - President & CEO, Ruggie Wealth Management
11:45 AM	12:00 PM	Break with Sponsors (Get Lunch Sponsored by Prudential)	
12:00 PM	1:00 PM	Washington & Regulatory Update (Session Over Lunch)	**Brian Graff** Executive Director, ASPPA
1:00 PM	1:15 PM	Beverage BreakSponsoredby Ishares and BlackRock	

Breakouts:		TRAU Students Only	Investments	Building a Practice	Practice Management
1:15 PM	2:15 PM	**MassMutual's Hugh O'Toole** on "***How to Develop and Implement Results-Driven Participant Education***"	**John Hancock's George Revoir** on "***In Plan Retirement Income***"	**American Century's Al Chingren, Kurt Jackson, Joe Brummel, and Mark Sheperd** on "***Designing a Statement of Services Agreement***"	**McGladrey's Rose Marie Panico-Marino (Moderator) & Advisor Panel: Dorann Cafaro, Jim Sampson & Michael Kozemchak** on "***State-of-the-Art Plan Design***"
2:30 PM	3:30 PM	**ING's Virginia Brennan & Bill Elmslie** on "***Using the Power of Behavioral Finance to Influence Participants & Prospects***"	**JP Morgan's Glenn Dial** on "***Analyzing Asset Allocation Funds & QDIA's***"	**Fidelity's Adrian Hodge (Moderator) & Advisor Panel: Jason Chepenik, Tim Rice & Anthony Franchimone, Marc Zimmerman** on "***Moving Up Market***"	**401kWire's Sean Hanna "*On Being Influential – Seeing 2020*"**
3:45 PM	4:45 PM	**McGladrey's Rose Marie Panico-Marino (Moderator) & Advisor Panel: Dorann Cafaro, Jim Sampson & Michael Kozemchak** on "***State-of-the-Art Plan Design***"	**Jerry Bramlett (Moderator), Steelpath's Brian Watson, Paradigm's Gordon Sachs and Parnassus's Grant Cleghorn** on "***The Value of Using Alternative Investments & Boutique Funds***"	**The 401kWire's Neil Anderson (moderator), Merrill Lynch's Peter Vincent & Joe Mrozek, Raymond James' Bo Bohanan, Financial Telesis' Jim Williams** on "***Broker Dealer Panel***"	**MassMutual's Hugh O'Toole** on "***How to Develop and Implement Results-Driven Participant Education***"
6:00 PM	7:00 PM	Reception			
7:00 PM	9:00 PM	Dinner Honoring The 401kWire's 2010 300 Most Influential Advisors in Defined Contribution – Top 40 Named			

2010 Conference Agenda

Friday, December 10, 2010

Start Time	End Time	Session	Speaker
7:00 AM	8:00 AM	Breakfast Sponsored by Fidelity	
8:00 AM	9:30 AM	The Retirement Advisor University & Leadership	**Kelly Bean** (Moderator) Assistant Dean, UCLA Anderson Executive Education **Fred Barstein** (Moderator) President & Executive Director, The Retirement Advisor University **John Welch** – Vice President, Rothschild **Joe DeNoyior -** Managing Partner, Washington Financial Group, LLP **Jeffrey Mark** – Owner, Fortune Capital Management
9:30 AM	10:00 AM	Beverage Break Sponsored by MassMutual	
10:00 AM	11:15 AM	The New Fiduciary	**John Carl** – President, Retirement Learning Center **Lou Harvey** – President, Dalbar **Don Faller** - Registered Principal, SagePoint Financial **Dorann Cafaro** - Cafaro Group
11:15 AM		Conference Ends	