

Institutional Investment Advisors and Consultants Forum: *Developing Expertise and Insights*

WELCOME

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Innovation, Communication, Evaluation

Goals for Today



- Increase understanding
 - Need
 - Solutions
- Address barriers
- Improve retirement security

What is IRIC?



- Non-profit formed in 2008
- **Mission:** facilitate the culture shift of defined contribution plans from supplemental savings plans to programs that provide retirement security
- **Vision:** serve as the industry's leading source of information and thought leadership on institutional retirement income solutions

IRIC Advisors



- Ross Bremen, NEPC
- Dorann Carfaro, Bdelium, Inc.
- William Charyk, Arent Fox LLP
- William Dewalt, Towers Watson Investment Services
- Jeff Eng, Russell Investments
- Clark Frese, Asset Strategy Consultants
- Jean Martone, Portfolio Evaluations, Inc.
- Sandy Pappa, Buck Consultants
- John Pickett, CAPTRUST Financial Advisors
- Michael Preisz, Preisz Associates
- Bruce Ashton, Drinker Biddle & Reath
- Martin Schmidt, HS2 Solutions
- Martha Tejera, Tejera & Associates, LLC
- Steve Vernon, Stanford Center on Longevity
- Ben Yahr, Ernst & Young

IRIC Sponsors



- Alliance Bernstein
- DST
- Great West / Empower Retirement
- John Hancock
- Lincoln Financial Group
- Natixis
- Prudential
- Transamerica
- Voya
- Wells Fargo

Firms in Attendance



- Alliance Bernstein
- Allianz Life
- Asset Strategy Consultants
- BOK Financial
- Buck Consultants
- CAPTRUST
- Cafaro Greenleaf
- Castle Rock Investing
- Cook Street Consulting
- Demarche
- DiMeo Schneider
- Drinker Biddle & Reath
- DST
- Empower Retirement
- Ernst & Young
- Fidelity
- Financial Engines
- Great West
- HS2 Solutions
- John Hancock
- Heintzberger Payne
- Highland Associates
- Hyas Group
- Innovest
- Lincoln Financial Group
- Moreton Retirement Partners
- Multnomah Group
- Natixis
- NEPC
- Nyhart Actuary & Employee Benefit
- Pavilion
- Portfolio Evaluations, Inc.
- Preisz Associates
- Prudential
- Rocaton
- Russell Investments
- RVK
- SageView
- Segal Rogerscasey
- SRSM Inc.
- Stanford Center on Longevity
- Tejera & Associates
- Towers Watson
- Transamerica
- Voya
- Wells Fargo
- Western Wealth Benefits

Many Thanks!



- Organization - ***Carmen Zollman***
- Facilities and Lunch – ***Empower Retirement***
- Reception – ***Prudential and Wells Fargo***
- Breakfast - ***Lincoln***
- ***Speakers***

Your Assignment



PROVIDE FEEDBACK –

Turn in your questionnaire!!!