

# Insured Retirement Matters

2022 Annual Report

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The annual report offers an update on IRI's major activities and initiatives. IRI is committed to partnering with our members to address the challenges and opportunities faced by the insured retirement industry. Working together, we can deliver on the promises our industry makes to help America's workers and retirees achieve a secure and dignified retirement.



## About IRI

The Insured Retirement Institute (IRI) is the leading association for the entire supply chain of insured retirement strategies, including life insurers, asset managers, broker-dealers, banks, marketing organizations, law firms, and solution providers. IRI members account for 90 percent of annuity assets in the U.S., include the foremost distributors of protected lifetime income solutions, and are represented by financial professionals serving millions of Americans. IRI champions retirement security for all through leadership in advocacy, awareness, research, diversity, equity, and inclusion, and the advancement of digital solutions within a collaborative industry community.

Learn more at [www.IRIonline.org](http://www.IRIonline.org).

## Contact IRI

For questions about this report contact IRI at [communications@IRIonline.org](mailto:communications@IRIonline.org).



# CEO Message

A year ago, IRI celebrated its 30th anniversary, a critical milestone in our evolution. It was also an opportunity to start a new era in the association's history. And we are well on our way. This year's annual report demonstrates our efforts to expand and improve services while advancing core priorities.

We have succeeded by being purposeful, proactive, and committed to continuous improvement. We are constantly communicating with, and listening to, members to ensure that we are focused on the most critical issues of the moment while looking ahead to prepare for future challenges. When we invest the time and effort to understand our members' needs and priorities, we invest in our collective achievement.

Our diligence and hard work produced substantial progress and accomplishments this year. These victories directly result from our members' commitment to advancing the priorities on IRI's agenda.

And we're not slowing down. As you will see in the "Look Ahead" portion of this report, we will deliver additional programs and services in the coming year, so stay tuned for more starting in January.

Thank you to the individual IRI member representatives who participate on committees, speak at events, and attend our conferences. We are also grateful for the leadership and dedication of our Executive Committee and Board of Directors, who provide strategic direction and invaluable input on the challenges and opportunities our industry faces.

Finally, thanks to the IRI staff who are committed to our mission and vision, work as a spirited team and make IRI the voice of the insured retirement industry.

Together, we continue to improve the retirement security prospects for America's workers and retirees, and we are looking forward to the coming year to further advance this vital mission.



**Wayne Chopus**, *President & CEO*

# New in 2022

Throughout 2022, IRI expanded the member value proposition by adding several new programs and initiatives while advancing several of our core priorities.

1

## **A New Look**

We started 2022 fresh with a new logo reflecting a modernized look and brand. Next, we rolled out a redesigned and improved website that is visually inviting, efficiently organized, and better equipped to provide information about IRI, our mission and vision, and our initiatives and programs.

2

## **Victory for Workers and Retirees**

Three years after leading the charge to pass the Setting Every Community Up for Retirement Enhancement (SECURE) Act, IRI's award-winning advocacy program delivered another victory for America's workers and retirees with the successful enactment of "SECURE 2.0 Act of 2022" legislation.

3

## **Premier Industry Event**

IRI's annual conference, the premier event for the insured retirement industry, returned with an in-person gathering to record attendance and sponsorship. The excitement and exhilaration in the face-to-face collaboration were incredible. We also debuted a unique Women's Leadership Symposium, one of our most successful and highly attended sessions ever.

4

## **New Products**

We launched The Link, an online guide to products and services that affect all business centers of our industry. And we expanded our successful Long View series, which has become a showcase for top executives in our industry. Our new Long View Voices brings the voices of the industry's leaders to your earbuds in a podcast format.

5

## **Research Multiplier**

We enhanced our already highly regarded and frequently cited research with a new sponsored partnership program that allows members to harness IRI expertise, prior research, broad industry perspective, and third-party status to bolster their efforts.

6

## **Driving Industry Adoption**

IRI's exclusive initiative to lead the industry in developing digital solutions made remarkable progress. Our efforts increased the use of e-Signature by 15%, developed several best practices to advance our goals further, and are making strides to reduce not-in-good-order (NIGO) issues.

7

## **Powered-Up Regulatory Affairs**

As a heavily regulated industry at the state and federal level, IRI commits substantial resources to regulatory matters. This year, we added a Compliance and Implementation element to our already extensive regulatory affairs team.

# Championing Retirement Security

IRI's public policy advocacy efforts focus on advancing retirement security for America's workers and retirees.



## Action Plan

IRI's Retirement Security Blueprint is the foundation of its public policy advocacy strategy. The member-driven proposals focus on seeking policy solutions to address the insecurity and anxiety millions of workers and retirees feel about their retirement future. In 2022, 26 IRI proposals were introduced as legislation and 15 were enacted into law.

## Passage of Secure 2.0

Congress passed the second comprehensive retirement security legislation in three years after more than a decade of no new federal laws to enhance and strengthen retirement security for America's workers and retirees, thanks mainly to IRI-led efforts. The Secure 2.0 Act includes 14 IRI-advocated provisions that expand opportunities for workers and retirees to save and facilitate access to lifetime income products.

14

IRI-advocated  
provisions in  
Secure 2.0

## New Opportunities for RILAs

IRI successfully led industry efforts to enact the bipartisan Registration of Index-Linked Annuities Act, an IRI priority issue for several years. The new law will reduce regulatory barriers and allow the industry to innovate and produce products to meet consumer needs. Registered index-linked annuities (RILAs) offer investors opportunities for some market growth with reduced downside risk to partially protect an investor from losses.

## Moving the Ball Downfield

Other IRI legislative initiatives advanced in Congress but fell short of enactment. However, IRI is better positioned to advance these bills in the next Congress. A bill to permit financial service firms to offer legal cannabis business retirement plans passed the House and nearly succeeded in the Senate. A remote notarization measure also passed the House on a strong bipartisan vote but did not receive Senate consideration.

## Growing Political Participation

IRI's political action committee, IRI PAC, contributes to political campaigns of Members of Congress who support IRI's public policy goals. In 2022, IRI-PAC raised \$134,000 and contributed to 71 incumbent Members of Congress, of which 70 were reelected in the midterm elections. In the 2021-2022 election cycle, IRI raised a record \$272,000 thanks to contributions from IRI member political action committees, IRI board members, and IRI staff.

## IRI Board Members Bolster Advocacy Efforts

More than 18 IRI board members participated in a virtual fly-in event in March. They met with nearly three dozen senators, representatives, and staff to discuss the policy proposals outlined in IRI's Retirement Security Blueprint.





IRI added a Compliance and Implementation structure to augment our Regulatory Affairs operations. The effort includes a new, dedicated staff person and a new committee focused on issues, challenges, and opportunities related to compliance with, and implementation of, state and federal rules and regulations.



To date, 30 states have adopted laws or rules based on the National Association of Insurance Commissioners (NAIC) annuity best interest model regulation. Proposals to adopt the regulation are under development in more than a dozen other states. IRI continues to actively pursue nationwide uniform adoption of this model.

Extensive state and federal regulatory activity was a feature of 2022. IRI actively engaged with federal and state policymakers on several proposals and other regulatory activities affecting the insured retirement industry. Most notably, IRI:

- 8



# Advocacy by the Numbers

33

Blueprint  
proposals

26

Blueprint proposals  
in legislation

25

Regulator  
meetings

45

Regulatory comment  
letters

220

Congressional  
meetings

60

Congressional bills  
lobbied

# Elevating the Member Experience

IRI employs a robust member engagement program to create a multi-channel approach to encourage dialogue and input. These efforts include regular communication, in-person events, committee meetings, webinars, and digital content.

Nearly  
**1,900**  
Registered webinar  
attendees

**35**  
Annual conference  
sponsors

**4,000**  
Committee  
participants

**19**  
Member company  
senior executive  
roundtable  
meetings



### Premier Industry Conference

Record-setting attendance and sponsorship highlighted the first in-person IRI annual conference in more than two years. The Washington, D.C. event featured robust content, a compelling speaker lineup, and eagerly anticipated networking opportunities, which produced overwhelmingly positive attendee reviews.

480

Annual conference  
attendees

### Asset Manager Symposium

IRI hosted a half-day, in-person symposium that focused on the perspectives and needs of asset managers. Industry leaders discussed the unique dynamics of insurer-asset manager partnerships and the challenges and opportunities that impact their firms broadly. All of IRI's asset manager member companies participated at this New York City event hosted by AllianceBernstein.

### Critical Member Dialogue

One of the most critical roles of an association is to communicate with, and listen to, members. IRI pursues a schedule of senior executive roundtable discussions with member companies. In 2022, IRI met with 19 member companies in this manner. Each was an opportunity to engage in a forum for mutual benefit that strengthened IRI's ability to deliver high-value services and understand industry trends.



### The Link

IRI launched [The Link](#): A Guide to Services and Solutions for the Insured Retirement Industry, an easy-to-use guide of products and services that affect all business centers of our industry, including fintech, insure tech, general consulting, law firms, IMOs, and more.

THE LINK



A photograph of a row of classical columns, likely from a government building, with a strong blue color cast. The columns are fluted and have papyrus capitals. They are set on a series of steps or a tiered base. The perspective is from a low angle, looking down the length of the colonnade.

# Celebrating Commitment to Excellence

IRI acknowledges and celebrates leaders who make valuable contributions to the insured retirement industry and champion retirement security for all Americans.



## Industry Champion of Retirement Security

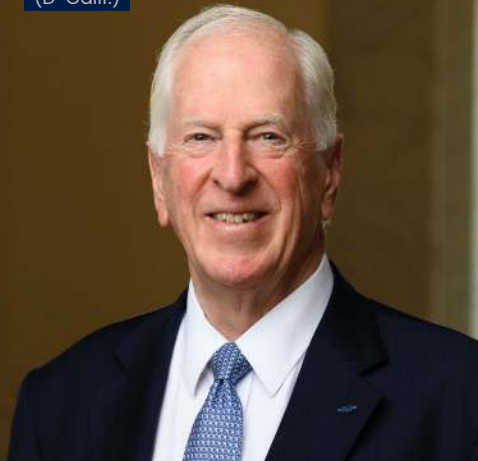
IRI honored Paula Nelson, Global Atlantic Financial Group's Managing Director & Head of Strategic Growth, as its Industry Champion of Retirement Security. Nelson also serves on the IRI Board of Directors and is Treasurer/ Secretary of IRI's Executive Committee. Nelson is among the industry's most accomplished leaders, a tremendous supporter of IRI, a powerful advocate for industry priorities, and committed to expanding diversity, equity, and inclusion across the industry.



## Public Policy Champions

Two distinguished members of Congress received the IRI Champion of Retirement Security Award, Rep. Mike Thompson (D-Calif.) and Rep. Kevin Brady (R-Texas), who provided crucial leadership and support to advance retirement security legislation in Congress this year.

Rep. Mike Thompson  
(D-Calif.)



Rep. Kevin Brady  
(R-Texas)



## Award-Winning Trade Association

Several IRI team members received recognition for their commitment to excellence and professionalism.

*Washingtonian Magazine* named IRI's Paul Richman to its 500 Most Influential People Shaping Policy list. Paul leads IRI's award-winning advocacy team, and his efforts have raised IRI's reputation and credibility on Capitol Hill as a constructive participant in retirement security issues.

Association Trends awarded both Paul Richman and John Jennings its Leading Lobbyist Award.



*The Hill* recognized Wayne Chopus and Paul Richman to its list of Washington D.C.'s Top Lobbyists.

Ragan Communications/PR Daily presented an honorable mention award to IRI's Dan Zielinski in its Media Relations Professional of the Year category. He was among nine finalists for this notable achievement.



# Advancing Digital Solutions

IRI's Operations and Technology community is leading initiatives to advance digital solutions throughout the Industry. Critical focus areas have been advancing e-Signature and e-Delivery adoption, automating replacement processing, and eliminating inefficiencies from license and appointment verifications. The community has also created a resource library for the operations and technology community that contains best practices in several areas of interest.



### Leading the Industry in e-Signature Adoption

IRI's leadership efforts have increased e-Signature usage by 15 percent since early 2021. We continue to explore and address barriers to adoption, including promoting e-Signature as the preferred method of conducting business and partnering with service providers to make the solution available to all. IRI is drafting a survey for financial advisors to identify issues impacting usage. The survey will focus on firms that have e-Signature implemented, and the results will inform our decisions for improving adoption.

### Automating Replacement Processing

IRI's Operations & Technology community continues to focus on eliminating bottlenecks in replacement processing. The focus for 2022 has been on enabling digital communication between carriers that are gaining and ceding the business. Additional work has been done to reduce common replacement NIGO issues to expedite replacement processing.

### Targeting NIGO Issues

A top error in processing new business continues to be related to missing and incomplete license and appointment information for the financial advisor. The Licensing & Appointments working group is working with the Association for Cooperative Operations Research and Development (ACORD) and the Depository Trust & Clearing Corporation (DTCC) to eliminate NIGO issues before business is submitted with a can/sell messaging service.

### Establishing Industry Best Practices for Success

The Operations & Technology community began working on creating a resource to capture the complete administrative lifecycle of an annuity along with a centralized, contextualized database of industry service vendors. This resource will be available in 2023 and will serve as a hub for industry training, understanding the interconnectivity of processes, and assisting in utilizing vendor resources.

The community created a series of [best practice documents](#) on IRI's website. Resources for Electronic Processing on Inforce Transactions include e-Signature for inforce transactions, e-Consent, and selling agreements for e-Signatures. IRI members also created resources for handling mergers, acquisitions, and conversions (MAC) in our industry, including a MAC best practice document and MAC checklist.

### Guiding Principles for Operations Modernization

1

Utilize e-Signature solution capabilities on all possible transactions

2

Move to a risk-based transaction supervision model in absence of an e-Signature solution

3

Suspend Medallion Signature Guarantee (MSG) requirements

4

Adopt alternative means of delivery for policy and supporting documents as the pathway to e-Delivery



# Facilitating DEI Progress

IRI and its members are committed to advancing diversity, equity, and inclusion (DEI) across the insured retirement industry. By acting in collaboration and establishing best practices, we can build workforces that reflect our communities and encourage all employees to bring their authentic selves to work every day.







## 2022 Women in Leadership SYMPOSIUM

### Women in Leadership Symposium

The inaugural Women in Leadership Symposium during IRI's 2022 Annual Conference generated strong attendance and significant social media engagement. Four industry leaders shared perspectives on championing and energizing women throughout their careers, leading from their roles, the advantages of being a woman in the financial industry, and more.

## Ditching Imposter Syndrome



Clare  
Josa



Melissa  
Kivett

### Imposter Syndrome Virtual Event

IRI hosted a keynote presentation with Clare Josa, author of *Ditching Imposter Syndrome*, and Melissa Kivett, Managing Director, Head of Enterprise Strategic Relationship Management, Prudential Financial, to discuss imposter syndrome and how it impacts our daily lives, especially in the workplace.

### IRI Delivers Diversity Benchmarking Data

As a partner of the Coalition for Equity in Wholesaling (CEW), IRI collected data on over 2,000 wholesalers from CEW member companies to establish baselines on diversity in the wholesaler workforce of the life and annuity industry.

The report also examines the use of proven programs and practices to promote DEI in recruitment and retention.



### Improving Financial Health

The insured retirement industry is committed to improving access to financial education. To further this goal, IRI presented a \$10,000 contribution to the Capital Area Asset Builders (CAAB), a Washington, D.C.-based organization that puts people on the road to financial independence. CAAB programs help low- and moderate-income individuals and families improve their money management skills and build wealth.



# Inspiring Ideas

IRI is an industry thought leader in advancing policies and initiatives that expand retirement security. We also provide an essential platform for industry leaders to inspire positive change and innovation to better serve clients and their communities.



## Digital Bullhorn

IRI unveiled a new website and logo, demonstrating a long-term investment in delivering enhanced value to members and bolstering IRI's credibility to external audiences. The new website is optimized to provide information about IRI programs, priorities, and how we advance our industry forward. The revamped site has attracted nearly double the traffic of the previous site.



## Celebrating Industry Leaders

Our Long View series is a unique opportunity for thought leaders within IRI's membership. This year, IRI expanded this popular feature with Long View Voices, a podcast that brings the voices of the industry's leaders to your earbuds. Influential executives share perspectives on the issues that matter most, the trends they see unfolding, and the innovations that will change the way we do business.



Yogini Biswas



Michael Eustic



Dylan Tyson

## Increasing Knowledge

IRI research supports member initiatives and is frequently cited in media reports. Our work is a potent value multiplier providing objective data and analysis to increase understanding of retirement issues. IRI issued its comprehensive 2022 *IRI Fact Book*, a valuable member benefit and the industry's go-to resource. IRI also issued its member-exclusive *State of the Industry Report* and quarterly annuity market data reports.



## Partnered Research

IRI produced two member-partnered reports in 2022, providing valuable findings to the sponsoring members and adding to the body of research available to all members. One report gauged financial advisors' awareness, usage, views, and preferences regarding fixed indexed annuities, multi-year guarantee annuities, and RILAs. Another study examined broker-dealer firms to understand their views of the digital transformation underway and what trends they see coming.

## IRI CEO Addresses Exclusive Tiburon Conference

The Tiburon Strategic Advisors CEO Summit invited Wayne Chopus to deliver a "Tiburon Talk" on retirement security legislation. The Summit is an exclusive gathering of financial services industry leaders to discuss the critical issues of the day.



# Spreading the News

IRI's proactive media communications efforts enhance the association's visibility and credibility as a significant industry thought leader. IRI is consistently a first-call organization for trade and general media outlets on retirement issues.



## By the Numbers

1,500

Mentions in news stories

33

Press releases

77

Media interviews

25%

Increase in LinkedIn followers

### Key Highlights

- ▶ Planned and executed a media outreach plan timed for House passage of Secure 2.0, which resulted in 19 stories mentioning IRI efforts.
- ▶ Eleven reporters attended an IRI background briefing on Secure 2.0 provisions. Several positive stories were generated, including follow-up on-the-record interviews with the *Wall Street Journal* and CNBC.
- ▶ Six reporters attended the IRI annual conference generating ten positive stories.
- ▶ Secured notable coverage of IRI efforts on RILA legislation, support for SEC funding for Regulation Best Interest, IRI's comments on ESG regulations, and additional data from IRI's Retirement Readiness Report.
- ▶ IRI dominated the news coverage of Congressional action on Secure 2.0 legislation. IRI was interviewed or mentioned in more than a dozen general and trade stories including NBC News, CNBC, Fox Business News, and MarketWatch.



# A Look Ahead

2023 will be an active year with several new IRI initiatives and offerings.





pillars and the Rising Star Award, which will recognize emerging leaders who show exemplary performance to their profession and the industry.

### Expanded Awards Program

Two new industry awards will debut at the 2023 IRI Annual Conference. A Leadership Award to reflect outstanding contributions by IRI committee chairs in one of IRI's strategic



### 2023 IRI Annual Conference

Join hundreds of industry executives for the premier insured retirement industry event at the JW Marriott Miami Turnberry Resort & Spa on March 15-17, 2023.

### Annuity Product Guide

A new, comprehensive product guide will be available in early 2023 that compares annuity and non-annuity income products. The new resource will help advisors understand these products' benefits and use cases.

### Collaborative Research Partnerships

IRI will expand marketing efforts for this unique research opportunity for member companies to partner with IRI to explore topics related to annuities and the retirement industry.



### Job Search Tool

An IRI Career Center will launch in January 2023 for job seekers and employers. The tool will allow users to search for, apply to, and post top jobs in the financial services industry and offer career planning resources.

### Fall Operations & Technology Event

IRI is working with our Operations and Technology community to create an exclusive event providing an opportunity for a deep dive into critical technology issues facing our industry.

### Women in Leadership Symposium

This powerful event will be a key feature at our 2023 Annual Conference after a smashing debut in 2022. Hear from female industry leaders who share how they navigated their career paths and support the advancement of women in our business.



### Focus on Compliance and Implementation

IRI's newest committee will hold its first in-person meeting at the 2023 Annual Conference on the heels of the newly enacted "Secure 2.0" legislation and the DOL's ESG regulation.

### IRI Blog

IRI is starting a blog to offer more insights and perspectives on significant issues and trends within the insured retirement industry.

# IRI Board of Directors

## Board of Directors Executive Committee

**Terri N. Fiedler** — Chair  
*President, Retirement Services*  
Corebridge Financial

**Philip J. Pellegrino** — Vice Chair  
*Executive Director, Head of Insured Solutions*  
UBS Financial Services, Inc.

**Paula Nelson** — Treasurer & Secretary  
*Managing Director & Head of Strategic Growth*  
Global Atlantic Financial Group

**John Kennedy** — Immediate Past Chair  
*Executive Vice President, Lincoln Financial Group,  
President, Lincoln Financial Distributors and  
Head of Brand*

**Robert L. Jameison**  
*Senior Vice President, Head of Insurance/  
Recordkeeper Segment & Investments*  
Fidelity Institutional Asset Management

**Kevin Kennedy**  
*Senior Vice President, Sales and Chief Marketing  
Officer of Retirement Solutions Division*  
Pacific Life Insurance Company

**Melissa Kivett**  
*Managing Director, Head of Enterprise Strategic  
Relationship Management*  
Prudential Financial

**Laura Pantaleo**  
*Managing Director, Wealth Management —  
Insurance and Retirement Solutions*  
J.P. Morgan

**Robert Pettman**  
*Executive Vice President, Wealth Management  
Solutions, Investor and Investment Solutions*  
LPL Financial

**Wayne Chopus**  
*President & Chief Executive Officer*  
Insured Retirement Institute

## At-Large Board Members

**Jacob Armstrong**  
*Senior Vice President, Head of Insurance  
Strategic Distribution*  
Franklin Templeton

**Doug Brigman**  
*President*  
Raymond James Insurance Group

**Melissa Buccilli**  
*Head of Retirement Insurance*  
BlackRock

**Graham Day**  
*President*  
Eagle Life Insurance Company

**Michael Eustic**  
*Head of Insurance and Subadvisory*  
Invesco

**Dev Ganguly**  
*Executive Vice President, Chief Operating Officer*  
Jackson Financial Inc.



# IRI Board of Directors

**Christopher Grady**

*Executive Vice President and Head of Retail  
Athene USA*

**Marci Green**

*Managing Director, Head of Retail Insurance  
Goldman Sachs Asset Management*

**Eric Henderson**

*President, Nationwide Annuity  
Nationwide Financial*

**Myles Lambert**

*Executive Vice President, Chief Distribution  
& Marketing Officer  
Brighthouse Financial*

**Peter Landry**

*Senior Vice President, Director, Insurance  
and Annuities  
Wells Fargo & Company*

**Christina Loftus**

*Head of Retirement National Accounts  
T. Rowe Price*

**Bill Lowe**

*President  
Sammons Institutional Group*

**Paul Lucas**

*Senior Vice President and Account Manager  
PIMCO*

**A. Roger Marinzoli**

*Senior Managing Director, Head of Product  
Development & Implementation  
TIAA — Product & Business Development*

**Bob McGowan**

*Managing Director & Head of the Americas  
Institutional Partnership Sales  
State Street Global Advisors*

**Joe Neary**

*Chief Risk Officer  
Cetera Financial Group*

**Jamie Ohl**

*President, Individual Solutions  
Transamerica*

**Sri Reddy**

*Senior Vice President  
Principal Financial Group*

**Katherine Roy**

*Principal, Retirement Products  
Edward Jones*

**Steve Scanlon**

*Managing Director — Head of  
Individual Retirement  
Equitable*

**John Schobel**

*Founder & CEO  
RegEd*

**Joe Schultz**

*Senior Vice President, Chief Client Officer  
American Century Investments*

**Wes Severin**

*Executive Vice President, Retirement Division  
Symetra Financial*

**Michael Sturm**

*Managing Director, Annuity Product Executive  
Bank of America*

**Todd Taylor**

*Senior Vice President and Head of Retail Annuities  
New York Life*

**Joseph Toledano**

*Managing Director, Head of Insured  
Solutions Group  
Morgan Stanley Wealth Management*

**Corey J. Walther**

*President  
Allianz Life Financial Services, LLC*

# IRI Leadership Team



**Wayne Chopus**  
*President &  
Chief Executive Officer*



**Christina Brady**  
*Chief Operating Officer*



**Shani Armon**  
*Chief Membership &  
Marketing Officer*



**Jason Berkowitz**  
*Chief Legal &  
Regulatory Affairs Officer*



**Katherine Dease**  
*Chief Technology &  
Innovation Officer*



**Frank O'Connor**  
*Vice President, Research*



**Paul Richman**  
*Chief Government &  
Political Affairs Officer*



**Dan Zielinski**  
*Chief Strategic  
Communications Officer*



# 2023

# IRI Annual Conference

The Insured Retirement Institute's (IRI) 2023 Annual Conference will gather representatives from the entire supply chain of the insured retirement industry to explore the leading business, political, regulatory, and technology issues of the day. The event will be in-person and held on March 15-17, 2023, in Miami, FL at the JW Marriott Miami Turnberry Resort & Spa.

The three-day conference will include expert insights, networking experiences, and opportunities for committees to connect and discuss important topics in their business disciplines.

## Who should attend?

➤ Sales

➤ Communications

➤ Legal

➤ Product Development

➤ Operations and Technology

➤ Advocacy

➤ Marketing

➤ Compliance

➤ Public Policy

[IRIConference.com](https://IRIConference.com)

*See you in  
Miami!*





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