Trends in Annuity Business Management

Information and Insights for Asset Managers

October 10, 2024 | Noon – 6 p.m. ET

AGENDA

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IRI is hosting its fourth annual half-day, in-person symposium focused on the unique perspectives and needs of asset managers. During the symposium, industry leaders will discuss trends, opportunities, and challenges in the manufacture, distribution, and risk management of annuity products and related retirement-oriented solutions. This will be a dynamic, interactive event where asset managers and insurance companies can come together to address the most important issues facing the industry today.

Noon – 12:45 p.m.

Lunch

12:45 – 1 p.m.

Opening Remarks

SPEAKERS

Wayne Chopus, *President & CEO*, Insured Retirement Institute
Aaron Shapley, *Senior Vice President*, Franklin Templeton

1 – 1:30 p.m.

Private Equity, Reinsurance and Expanding Capital

Private equity (PE) firms have become a significant presence in the annuity space, and PE backed insurance companies account for a significant portion of annuity sales in today's market. Panelists will discuss the implications of PE ownership and reinsurance trends in terms of capital formation, changes to the competitive landscape, and opportunities for asset managers.

SPEAKERS

Guillaume Briere-Giroux, FSA, MAAA, CFA, *Partner*, Oliver Wyman
Colleen Tycz, *Senior Vice President, Head of Strategic Accounts & Insurance Distribution*, Franklin Templeton

1:30 – 2:30 p.m.
Index Strategies in RILA/FIA
A discussion encompassing RILA/FIA product development and index strategies, market trends, and new research on optimal index allocation in RILAs and FIAs with significant implications for product manufacturers and financial advisors.

SPEAKERS
John P. Baxter, *Assistant Vice President, Retirement Development Consultant*, Wells Fargo Advisors
Mark Paulson, *Vice President, Hedging*, Allianz Investment Management LLC
Brian Seidman, CRPC®, CAS, *Vice President, Sr. Divisional Sales Manager*, Brighthouse Financial
David Blanchett, PhD, CFA, CFP®, *Managing Director & Head of Retirement Research*, PGIM (Moderator)

2:30 – 3 p.m.
Networking Break
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3 – 3:10 p.m.
Membership Engagement Update
SPEAKER
Shani Armon, *Chief Operating Officer*, Insured Retirement Institute

3:10 – 4 p.m.
Opportunities in General Account Investing
This discussion will focus on product and solution needs amid a rising interest rate environment, equity market volatility and growing commercial real estate investment risks. Panelists will offer insights into how insurers think about investing premium dollars, how investment banks interact with annuity issuers, and the opportunities and risks they see on the horizon.

SPEAKERS
Farhad Mian, *Managing Director (Investment Strategy)*, Corebridge Financial
Bruce Stanforth, *General Investment Account Portfolio Manager*, MassMutual
Peter Miller, CFA, FSA, *Head of Insurance Solutions, Multi-Asset Strategies*, Invesco (Moderator)

4 – 5 p.m.
Model Portfolios for Variable and Contingent Deferred Annuities
Retail investing continues to push toward models, but VA platforms lag behind and rely more heavily on selecting individual funds. This panel will examine model portfolio development and other potential opportunities from both the corporate (profitability, hedging, risk-based capital, etc.) and market demand standpoints.

SPEAKER
Dan Gutman, *Vice President, Future Growth*, Prudential Retirement Strategies
Jay Jackson, *Senior Vice President, Investment Products*, LPL Financial
Rich Romano, *Chief Executive Officer*, FIDx
Ryan Haezebrouck, *Director, BlackRock Retirement Insurance*, BlackRock (Moderator)

5 – 6 p.m.
Reception
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