Trends in Annuity Business Management

Information and Insights for Asset Managers

November 13, 2025 | New York, NY

AGENDA

HOSTED BY

AllianceBernstein®

IRI is hosting its fifth 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

Michael Hart, *Senior Vice President, Insurance Services*, AllianceBernstein
Wayne Chopus, *President & CEO*, Insured Retirement Institute

1 – 1:45 p.m.

FIA & RILA Custom Indexes: Competing for 10% of the Business

Despite continued innovation in custom indexes, with new approaches like dual direction and dozens of options available in some contracts, FIA and RILA sales remain stubbornly concentrated in basic S&P 500 strategies. In this session we'll have experts and gatekeepers discuss the impediments to the use of custom indexes and strategies for growing the market.

SPEAKERS

Michael Lee, *Financial Planne*r, Prudential Advisors
Adam Politzer, *Chief Product Officer*, Athene USA
Steve Scanlon, *Managing Director, Head of Individual Retirement*, Equitable

MODERATOR

Eric Wilson, *Head of Subadvisory*, JP Morgan Asset Management

1:45 – 2:30 p.m.

Decumulation Nation

Since the passage of the SECURE and SECURE 2.0 Acts, annuities and annuity-based solutions have gained a strong foothold in the retail wealth management space—and are increasingly being integrated into workplace plans through target-date funds with embedded living benefits. The growing demand for pension-like income and more holistic retirement planning, combined with industry efforts to modernize how annuities are researched, purchased, and managed, continues to accelerate this trend. At the same time, while market data shows increasing adoption of fixed indexed annuities (FIAs) and registered index-linked annuities (RILAs) to protect a portion of retirement assets, traditional non-annuity strategies such as bond ladders and systematic withdrawal approaches remain core components of income planning. This discussion will explore how and why different decumulation strategies are used, what drives advisors and participants to choose among them, and how the evolving advisor and participant experience is shaping the future of both in-plan and retail guaranteed lifetime income solutions.

SPEAKERS

Jenny Glowacki, *Head of In-Plan Advice & Income*, Corebridge Financial
Michael Kazanjian, *Head of Insurance Overlays*, FIDx
Ed Malone, *Sales Leader, Protected Retirement*, Nationwide Financial

MODERATOR

Marci Green, *Head of Retirement Distribution & Retail Insurance*, Goldman Sachs Asset Management

2:30 – 2:45 p.m.

Networking Break

2:45 – 3:30 p.m.

Digital First and the Advisor and Consumer Experience: Why Should You Care?

Insurance companies and distributors are rapidly adopting Digital First strategies to streamline and improve all aspects of the annuity experience. From illustration to portfolio inclusion to transacting and servicing to replacements, pain points are being eliminated. This will be of particular importance for expanding into the RIA market and managed money, through both traditional fee-based annuities and contingent deferred annuities (CDAs). Learn more about what this means for the annuity business overall, and the significance of this revolution for both annuity usage and annuity perception.

SPEAKERS

Eli George, *Senior Vice President, Wealth Strategy*, SS&C Black Diamond® Wealth Solutions
Scot MacDonald, *Vice President, Business Development & Planning Integration*, Fidelity Investments
Dylan Tyson, *President, Retirement Strategies*, Prudential Financial

MODERATOR

Katherine Dease, *Chief Technology & Innovation Officer*, Insured Retirement Institute

3:30 – 4:15 p.m.

Roundtable Discussions

Working at assigned tables, attendees will engage in guided discussions focused on key topics. Topics to be discussed include educating the market on product diversification; expanding beyond traditional retirement income models; and asset managers role in the digital-first evolution.

SPEAKER

Dan Herrick, *Vice President, Membership & Business Development*, Insured Retirement Institute

4:15 – 4:45 p.m.

Roundtable Report-Outs and Discussion

Attendees will share insights from the roundtable discussions.

4:45 – 4:50 p.m.

Closing Remarks

SPEAKER

Anna Hildreth, *Vice President, Marketing & Events*, Insured Retirement Institute

4:50 – 6 p.m.

Reception

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