

# 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**

**Wayne Chopus**, *President & CEO, Insured Retirement Institute*

**Michael Hart**, *Senior Vice President, Insurance Services, AllianceBernstein*

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**

**Johnna Chewning**, *Vice President, Annuity Product Management, Raymond James*

**Adam Politzer**, *Chief Product Officer, Athene*

**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**

Post SECURE and SECURE 2.0, annuities and annuity-based solutions are beginning to gain a toehold, with more plan adoption of target date funds combined with living benefits to build personal pensions and point of retirement annuity payout options. But participant usage is low, and in retail annuities the trend has been toward using FIAs and registered index-linked annuities (RILAs) to protect a portion of assets while non-annuity approaches such as bond ladders and systematic withdrawals are used for income. This discussion will focus on why and how different approaches are used, what drives participants and advisors to choose one or the other, and the future of both in-plan and retail protection and guaranteed lifetime income solutions.

#### **SPEAKERS**

**Jenny Glowacki**, *Head of In-Plan Advice and Income*, Corebridge Financial

**Ed Malone**, *Sales Leader, Protected Retirement*, Nationwide Financial

#### **MODERATOR**

**Marci Green**, *Managing Director, Head of 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**

**Scot MacDonald**, *Vice President, Business Development & Planning Integration*, Fidelity Investments

**Rich Romano**, *Chief Executive Officer*, FidX

**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**

Attendees will break out into smaller groups for facilitated discussions centered on specific topics. Financial Advisors will join these discussions to offer their “boots on the ground” perspectives.

#### **MODERATOR**

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