

Agenda

Updated 04/16/2025

Wednesday, March 26

1:30 – 4 p.m.

Giveback Activity

Stop by the Giveback Station in the Tampa Bay Ballroom Foyer. Help package art activity kits that will be donated to the children's wing of Tampa Bay General Hospital.

Sponsored by  **FRANKLIN TEMPLETON**

2 – 2:15 p.m.

Welcoming Remarks

SPEAKER

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

2:15 – 3:15 p.m.

Leadership Insights: Addressing Challenges, Inspiring Change

Kick off your conference experience with a dynamic and thought-provoking opening session featuring top executives from leading insurance companies. These industry leaders will share their strategic perspectives on the key forces shaping the insured retirement landscape. Gain firsthand insights into how leading insurers innovate, adapt, and stay ahead of evolving consumer expectations to achieve long-term success.

SPEAKERS

Kevin Hogan, *President & CEO*, Corebridge Financial

Grant Kvalheim, *Chief Executive Officer & President*, Athene USA

Nick Lane, *President*, Equitable

MODERATOR

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

3:15 – 3:30 p.m.

IRI Award Presentation

IRI's awards program acknowledges leaders who make valuable contributions to the insured retirement industry. During this presentation, IRI will be honoring the recipients of the Industry Champion of Retirement Security and the Leadership Awards.

3:30 – 4 p.m.

Networking Break

Sponsored by 

4 – 5 p.m.

Bringing Impossible Ideas to Life

Technology & A.I. are dramatically changing what's possible in our world. Our challenge as we create new things is to dislodge from the comfort of what we already know. Chris created Shazam after being told by every "expert" that his outlandish idea was impossible. It was an idea far ahead of its time — eight years before iPhone apps even existed. In this presentation, Chris helps attendees imagine and then create new visions for the future. He inspires with jaw dropping stories about creating Shazam. Attendees learn a new framework of thinking to create change through technology.

Sponsored by 

KEYNOTE SPEAKER

Chris Barton, *Founder & Creator*, Shazam

MODERATOR

Andrew Resnik, *Head of Sales Development*, Global Atlantic Financial Group

5 p.m.

Closing Remarks

SPEAKER

Dan Zielinski, *Chief Strategic Communications Officer*, Insured Retirement Institute

5 – 6:30 p.m.

Welcome Reception

Inspired by Tampa's Gasparilla Festival of Arts, we invite you to immerse yourself in our art gallery reception. Enjoy art in many forms, including pieces from local artists, wall projections, and a musical performance, while catching up with peers and colleagues. Drinks and hors d'oeuvres will be served.

Sponsored by 

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7:30 – 9 a.m.

Sponsored Thought Leadership Presentation & Legal Forums

Replacement Automation Round Table Discussion

Distributors, IMO, Carrier New Business Replacement Management and Financial Professionals SHARE YOUR THOUGHTS. A lot of positive changes have occurred based on last year's great feedback. Let's continue to the discussions on removing friction from the Financial Professionals' experience and streamlining back-office replacement processing. Topics dictated by participants and facilitators should include Straight-Through-Paperless replacement processing initiatives, e-Signature acceptance updated rules, e-App updates, 1035YellowPages data and workflow automation enhancements.

SPEAKERS

Beth Maziad, *Senior Vice President, Operations & Administration*, Raymond James

Fallon Wills, *Assistant Vice President, Operations Support*, Athene

MODERATOR

Cheri DeBoer-Stinson, *Director Business Development*, Cooperative Technologies

Sponsored by  COOPERATIVE TECHNOLOGIES

MYGAs, RILAs, & Private Credit...Oh My!

Join Conning for an in-depth discussion on the evolving landscape of annuity products, including Multi-Year Guaranteed Annuities (MYGAs) and Registered Index-Linked Annuities (RILAs), as well as Private Credit. Our panel of experts will examine pivotal issues and essential concepts shaping the future of annuity design and distribution. The session will address innovative product structures, emerging market trends, and regulatory considerations, providing insights to aid insurers and distributors in navigating today's competitive environment. This event offers an opportunity to gain strategic perspectives and actionable takeaways to achieve success in the rapidly changing annuity industry.

SPEAKERS

Scott Hawkins, *Managing Director, Head of Insurance Research*, Conning

Matt Reilly, *Managing Director, Head of Insurance Solutions*, Conning

MODERATOR

Manu Mazumdar, *Director, Head of Data Analytics & Insurance Technology Insurance Research*, Conning

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Thursday, March 27, continued

Indexing and the Annuity Ecosystem

As the market for indexed annuities has grown significantly since the introduction of the first fixed index annuity in 1995, so too has the volume and complexity of the indices used within these products. Evolutions in indexing beyond benchmark equity indices like the S&P 500 have helped drive value for policyholders, yet the growing complexity also demands more education and understanding. This session will gather perspectives from across the ecosystem — index provider, hedge provider, and insurance carrier — to dive deeper into the relationship between indices and the annuities in which they're offered.

SPEAKERS

Phil Brzenk, *Managing Director, Global Head of Multi-Asset Indices, S&P DJI*

Ryan Cullen, *Director Head of EQD Insurance Solutions Sales, BNP Paribas*

Matt Johnson, *Product and Distribution Strategy, American Equity Investment Life Insurance Company*

MODERATOR

Kelsey Stokes, *Sales Head, Insurance, S&P DJI*

Sponsored by **S&P Dow Jones Indices**
A Division of S&P Global

The New SEC Regulatory and Enforcement Landscape

Four former SEC attorneys will share their observations and practical insights on the new SEC regulatory and enforcement landscape, including: the new SEC Chairman and his priorities, the potential for regulatory reversals as well as regulatory flexibility, changes in enforcement areas of focus and approach, the impact of recently issued presidential executive orders, pending legislation, the potential entrance of more aggressive state securities regulators, state attorneys general, and the class action bar in response to the perception of a less expansive SEC enforcement program, and the latest cases.

SPEAKERS

Justin Chretien, *Shareholder, Carlton Fields*

Tom Conner, *Shareholder, Carlton Fields*

Dean Conway, *Shareholder, Carlton Fields*

Harry Eisenstein, *Shareholder, Carlton Fields*

MODERATOR

Richard Choi, *Shareholder, Carlton Fields*

Sponsored by **CARLTON FIELDS**

7:30 – 9 a.m.

Networking Breakfast

Sponsored by  **UBS**

7:30 a.m. – 2 p.m.

Headshot Station

Take advantage of this opportunity for an updated headshot with our professional photographer who will guide you through different poses in just a few minutes.

Sponsored by  **Lincoln Financial**

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8 a.m. – 2 p.m.

Giveback Activity

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9 – 9:15 a.m.

Transition Break

9:15 – 9:30 a.m.

Opening Remarks and IRI Annual Business Meeting

SPEAKERS

Jason Berkowitz, *Chief Legal & Regulatory Affairs Officer*, Insured Retirement Institute

9:30 – 10:30 a.m.

Women in Leadership Symposium

The 2025 Women in Leadership Symposium will bring together different perspectives in the supply chain to discuss the unique needs of the female consumer.

SPEAKERS

Margaret Meister, *President & CEO*, Symetra Financial
Shannon Reid, *President, Independent Contractor Division*, Raymond James Financial Services
Rabia Sattaur, *Director, Practice Management & Consulting*, Fidelity Institutional

MODERATOR

Suzanne Norman, *Education Fellow*, Alliance for Lifetime Income

Sponsored by 

RAYMOND JAMES

 **SYMETRA**

10:30 – 11 a.m.

Networking Break

Sponsored by  **zinnia™**

11 – 11:45 a.m.

Concurrent Sessions

DIGITAL FIRST TRACK

Building a Future-Ready Digital Strategy

This session brings together industry leaders to explore how adopting Digital First for Annuities standards can unlock significant business growth opportunities while mitigating future risks. Panelists will highlight the standards' transformative potential in driving efficiency and innovation within the annuities industry. Senior leaders will discover why active engagement is crucial at the highest levels to ensure the adoption of these standards and position their organizations for long-term success.

SPEAKERS

Michael Downing, *Chief Operating Officer*, Athene and IRI Board of Directors and *Co-Vice Chair*, Digital First Steering Committee (Carrier)

Scott Haggerty, *Chief Operating Officer*, Prudential Retirement and *Chair*, Digital First Steering Committee (Carrier)

Emily LeMay, *Managing Director, Co-Head of Individual Markets*, Global Atlantic Financial Group and *Co-Vice Chair*, Digital First Steering Committee (Carrier)

Arron Price, *Chief Operating Officer*, Financial Independence Group and *Vice Chair*, Digital First Steering Committee (Distributor)

MODERATOR

Jordan Jackson, *Senior Vice President, Head of Insurance Solutions*, Raymond James Insurance Group and IRI Board of Directors and *Chair*, Digital First Steering Committee (Distributor)

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ANNUITY MARKET TRACK

The Sell Side: What's in the Annuity Lab?

Sales of fixed annuities, fixed index annuities, and RILAs have soared to a record \$324 billion, while once-dominant variable annuities have dropped from 73 percent to 13 percent of sales since 2007. What does the future hold? Join this dynamic panel as they explore how annuities are evolving to meet Americans' growing need for wealth protection and income. Discover the latest product innovations and what they mean for the next decade of financial planning.

SPEAKERS

Pete Golden, *Chief Sales & Distribution Officer*, Equitable
Greg Masucci, *Senior Vice President, Strategic Relationships*, Jackson National Life Insurance Company
Corey Walther, *President*, Allianz Life Financial Services and *Vice Chair*, IRI Board of Directors

MODERATOR

Colleen Tycz, *Senior Vice President, Head of Strategic Partnerships & Insurance Distribution*, Franklin Templeton and IRI Board of Directors

ADVOCACY & COMPLIANCE TRACK

Navigating Key Regulatory Developments

Join top legal and compliance experts as they break down the most impactful regulatory activity over the past year and discuss regulators' top issues in 2025. From financial professionals' standards of conduct to AI advancements, this panel will explore IRI's top priorities and how IRI supports members' compliance and implementation efforts. Walk away with practical strategies to help you stay ahead of the curve as you prepare for the latest rule changes.

SPEAKERS

Chad Batterson, *Vice President, Compliance*, Athene
Zoe Gruber, *Assistant Vice President, Head of Government Affairs*, Security Benefit and *Vice Chair*, IRI State Affairs Committee
Tobie Steele, *Vice President, Regulatory Sourcing & Analysis*, Wells Fargo Advisors

MODERATOR

Paul Chryssikos, *Senior Vice President, Chief Counsel*, Distribution, Technology & Risk, Lincoln Financial

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11:45 a.m. – Noon

Transition Break

Noon – 12:45 p.m.

Concurrent Sessions

DIGITAL FIRST TRACK

Elevating the Annuity Experience with IRI's Digital-First Approach

Join us to explore how IRI's Digital-First for Annuities initiative is driving the creation of exceptional experiences. Hear from industry leaders who participated in the first IRI Industry-wide Hackathon — A Digital-first Experience — and who are successfully implementing these strategies, transforming both financial professional and consumer experiences. Discover how to position your organization as a leader in the annuity market by enhancing and embracing innovation.

SPEAKERS

Michael Finnegan, *Executive Director*, Morgan Stanley Wealth Management

Curtis Lawhorn, *Head of Enterprise Architecture*, American Equity Investment Life Insurance Company

Amit Vashisht, *Assistant Vice President*, Jackson Enterprise Technology, Jackson Financial

MODERATOR

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

ANNUITY MARKET TRACK

The \$80 Trillion Question: Are We Ready for the Wealth Transfer Boom?

Location: HB Plant Ballroom E

Over four million baby boomers will turn 65 each year through 2027, and by 2030, the entire generation will have reached retirement age. Alongside this milestone comes an extraordinary wealth transfer — estimated at up to \$80 trillion. Is the financial industry equipped with the right products, talent, and messaging to connect with and serve the next generation of wealth recipients? Join this session to explore the strategies needed to seize this opportunity.

SPEAKERS

Michael Conrath, CFP®, CRPC®, *Managing Director & Chief Retirement Strategist*, J.P. Morgan Asset Management

Philip Pellegrino, *Managing Director, Head of Wealth Planning & Insured Solutions*, UBS Financial Services, Inc. and *Chair*, IRI Board of Directors

Katherine Roy, *Principal, Retirement Products*, Edward Jones and IRI Board of Directors

MODERATOR

Steve Gresham, *Managing Principal*, NextChapter and *Senior Education Advisor*, The Alliance for Lifetime Income

12:45 – 1:45 p.m.

Networking Lunch

Sponsored by  **EQUITABLE**

1:45 – 2 p.m.

Transition Break

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Thursday, March 27, continued

2 – 2:45 p.m.

Concurrent Sessions

DIGITAL FIRST AND **ANNUITY MARKET** TRACKS

Unlocking Annuity Market Growth: Insights from Financial Professionals

Location: HB Plant Ballroom ABCD

Discover transformative opportunities to boost annuity adoption among financial professionals. Despite widespread acknowledgment of their benefits, annuities remain underutilized. What are the key enhancements needed to attract more financial professionals to consider annuities as the preferred solution to secure income or protect assets for their clients? Gain actionable insights as financial professionals share their perspectives on the most impactful changes needed to grow the annuity market.

SPEAKERS

Bruce Cacho-Negrete, CFP®, *Private Wealth Advisor, Senior Vice President, Financial Planning*, Raymond James
Dywane Hall, MA, CRPC®, AIF®, *Registered Principal*, LPL Financial

Ewelina Mroczek, *Vice President, Digital Product Transformation, Annuity Solutions*, Lincoln Financial

MODERATOR

Frank O'Connor, *Vice President, Research*, Insured Retirement Institute

ADVOCACY & COMPLIANCE TRACK

Maximizing Lifetime Income Opportunities in the New Administration

This panel of political and regulatory experts will explore strategies our industry can use to capitalize on the Trump administration's deregulatory agenda to reduce business friction and improve the experiences of consumers and financial professionals. The panelists will also examine the potential pitfalls of de-regulation and how to avoid them. Gain insights to help your business take advantage of the administration's commitment to trimming the fat from the federal rulebook.

SPEAKERS

Gina Alsdorf, *Shareholder*, Carlton Fields
Richard Goldberger, *Associate General Counsel*, Equitable
Brad Rodgers, *Senior Vice President and Senior Counsel*, Protective Life Corporation

MODERATOR

Chris Spence, *Managing Director, Government Affairs*, TIAA and *Chair*, Retirement Plans and Tax Committee

2:45 – 3 p.m.

Transition Break

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3 – 4 p.m.

Going for the Gold

Knowing she'd have to perform remarkably to beat out the world's best swimmers and win the 800-meter freestyle at the 2012 Olympics, 15-year-old Katie Ledecky made the most important pivot of her life. As Ledecky takes the attendees behind the scenes at her first Olympics games, she reveals the importance of being willing to adapt your game plan to win big and why having confidence in your ability is more important than the expected outcome. In this talk, Ledecky shares her gripping story of going against her coach's race strategy to win her first Olympic gold medal. Adapting her lessons from the pool for the workplace, she provides her Olympian-level perspective on how to inspire high performance for teams and individuals in any field, as well as tips for recognizing when it's necessary to pivot in order to be successful.

KEYNOTE SPEAKER

Katie Ledecky, *Most Decorated U.S. Female Olympian, 14x Olympic Medalist, 21x World Champion Swimmer, 16x World Record Breaker*

MODERATOR

Kevin Kennedy, *Senior Vice President of Sales & Chief Distribution Officer, Consumer Markets Division, Pacific Life Insurance Company and IRI Board of Directors*

Sponsored by  **PACIFIC LIFE**

4 p.m.

Closing Remarks

SPEAKER

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

4 – 5 p.m.

Networking Happy Hour

Join us for drinks and hors d'oeuvres while networking with attendees and strolling through the tabletop displays showcased throughout the ballroom foyer.

Sponsored by  **ATHENE**

5 – 6:30 p.m.

Sponsored Thought Leadership Presentation & Legal Forums

Insurance Exchange Continues to Innovate the Future of Annuities

Recharge with FIDX and iCapital, the innovative teams behind Insurance Exchange. Join us for an evening of complimentary drinks, hors d'oeuvres, and engaging conversations as you learn about the latest advancements in our annuities platform. The event will feature an unforgettable bourbon tasting experience with retired Special Operations Lt. Col. USAF Jerry Lavelly. Between sips of one of St. Petersburg's most award-winning bourbons, Jerry will give a behind the curtain recount of the story about the small team of green berets who rode horses into Afghanistan after 9/11 and inspired the "12 Strong" book and film.

SPEAKERS

Scott Bowers, *Chief Strategy & Distribution Officer, FIDX*

Michael Kazanjian, *Chief Marketing Officer, FIDX*

Scott Stolz, *CFP, RICP, Managing Director, iCapital Solutions*

Sponsored by 
INSURANCE EXCHANGE
POWERED BY FIDX AND ICAPITAL

Agenda

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Give Your Producers the Green Light: Enabling Real-Time “Clear to Sell” in a Dynamic Compliance Environment

As industry training and compliance requirements become more complex (see California Life and Annuities), the challenge of validating producer credentials in real-time has become increasingly difficult and creates a negative experience for the consumer and agent. In this session RegEd subject matter experts will discuss the latest developments in industry training and CE requirements, and provide an overview of how leading firms are utilizing streamlined processes and the industry's only technology and data integration solution to deliver a “can-sell” signal to their producers, eliminating NIGOs and speeding producer time to market.

SPEAKERS

Brandi Brown, Executive Vice President, Regulatory Affairs, RegEd

Michael Pouliot, Executive Vice President, Head of Xchange Sales, RegEd

Jacob Spitzley, Director of Product Management, RegEd

Sponsored by **RegEd**

Innovation in Annuities — A potential recipe for success: Strategies for RILAs, FIAs, buffered funds, and more

Having the right ingredients for your product lineup and distribution strategy may create the perfect recipe for success. Join us for locally inspired refreshments and a conversation on our latest innovations in investments and distribution techniques to help optimize your products. We'll discuss how you can leverage the power of Invesco QQQ ETF in index design for RILAs and FIAs, as well as use buffered funds and structurally defensive strategies to potentially enhance client outcomes within variable annuities. Stick around for a cigar rolling demonstration by skilled local artisans.

SPEAKERS

Kyle Elliott, Senior Strategic Account Manager, Invesco U.S.

Mike Eustic, Head of US Insurance & Subadvisory, Invesco U.S. and IRI Board of Directors

Ryan Kagy, Senior Strategic Account Manager, Invesco U.S.

Adam Rivituso, National Director, Sales and Business Development, Invesco U.S.

Sponsored by  **Invesco QQQ**

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Friday, March 28

8 – 8:45 a.m.

Breakfast

8:45 – 8:50 a.m.

Opening Remarks

SPEAKER

Shani Armon, *Chief Operating Officer*, Insured Retirement Institute

8:50 – 9:10 a.m.

IRI Awards Presentations

IRI's awards program acknowledges leaders who make valuable contributions to the insured retirement industry. During this presentation, IRI will be honoring the recipients of the Rising Star and the Chairman Awards.

9:10 – 10:10 a.m.

Reading Other People and How Others Read You

Having mastered the arts of communication and psychology and applied them as a Secret Service special agent leading mission-critical criminal investigations, interrogations, and undercover assignments, Evy Poupouras teaches audiences top-tier techniques for enhancing their verbal and nonverbal communication skills, as well as deciphering others. She will teach attendees action steps for commanding respect and authority through body language, developing verbal skills to convey ideas with conviction and how to decode verbal language to understand what people are really saying. Whether assessing potential clients in a business meeting or trying to understand the true motives of a relationship, Poupouras' insights will ensure successful interactions.

KEYNOTE SPEAKER

Evy Poupouras, *Former Secret Service Special Agent and Interrogator, Co-Host of Bravo TV's "Spy Games"*

MODERATOR

Mark Halloran, *Managing Director, Head of Business Development*, Transamerica

Sponsored by  **Transamerica™**

10:10 – 11 a.m.

The Future of Annuities: Game Changers or Status Quo?

Can in-plan and contingent deferred annuities (CDAs) revolutionize how advisors and consumers view annuities, driving broader adoption for income protection? Or will traditional attitudes hold firm? Join industry leaders for a forward-thinking discussion on the evolving landscape of annuity solutions. Discover the latest innovations and explore the potential impact on advisor practices and consumer demand.

SPEAKERS

Craig Hawley, *President, Nationwide Annuity*, Nationwide Financial and IRI Board of Directors

Dylan Tyson, *President, Retirement Strategies*, Prudential Financial and IRI Board of Directors

MODERATOR

Sean Baker, *Managing Director, Head of Retirement Insurance*, BlackRock and IRI Board of Directors

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Friday, March 28, continued

11 – 11:45 a.m.

The Election Results Are In: Outlook for Retirement Security Policy in Washington

The results of the 2024 election have brought changes in leadership and control at the White House and on Capitol Hill, creating a new political environment for federal retirement security policy. The panel of inside-the-beltway industry advocates will share their insights about how IRI can capitalize on the change in the political landscape and opportunities it presents to advance its policy priorities in Congress and with the Administration.

SPEAKERS

Sean Cassidy, *Head of U.S. Government & Policy Affairs*, Transamerica

Jeff Strunk, *Managing Partner*, Forbes Tate Partners

Annie Webb, *Assistant Vice President Government Relations*, Nationwide Financial and *Chair*, IRI Advocacy Steering Committee

Michael Williams, *Partner*, Forbes Tate Partners

MODERATOR

Paul Richman, *Chief Government & Political Affairs Officer*, Insured Retirement Institute

11:45 a.m.

Closing Remarks

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Committee Meeting Agenda

8:30 – 11:15 a.m.

Advocacy Steering Committee Meeting (Invitation Only)

Lunch will be available at 11:15 a.m.

9 – 11 a.m.

Operations & Experience Optimization Senior Steering Committee (Invitation Only)

Lunch will be available at 11 a.m.

9 a.m. – Noon

Retirement Research Committee Meeting (Invitation Only)

Lunch will be available at Noon

Noon – 1:30 p.m.

Compliance & Implementation Committee Meeting (Invitation Only)

Lunch will be available at 11:15 a.m.

Noon – 1:30 p.m.

Operations & Technology Joint Session for Digital First Steering Committee (Carrier and Distributor) (Invitation Only)

Lunch will be available at 11 a.m.