2026 IRI Asset Manager Symposium

HOSTED BY BlackRock

From Insight to Implementation
Winning in the Next Phase of Annuity Distribution

September 2, 2026 | New York, NY

The annuity industry has never been stronger. Record sales reflect growing demand for protected retirement income, yet many financial advisors still struggle to confidently recommend, implement, and manage annuity solutions. Bridging the gap between industry momentum and advisor adoption is the challenge, and the opportunity, this event is designed to address.

IRI's sixth annual Asset Manager Symposium brings together senior leaders from asset management, insurance, distribution, and financial technology for a focused half-day discussion. The 2026 program is grounded in research, market trends, and the realities of retirement income planning, combining thought-provoking industry discussions with a distinctive, practitioner-led session that follows a real annuity implementation from recommendation through execution.

The result is a program that moves from insight to action, exploring the research behind guaranteed income, real-world approaches to integrating annuities into client portfolios, the evolving decumulation landscape and competitive environment, and a candid discussion of the opportunities and challenges shaping the future of retirement income.

AGENDA

Noon – 12:45 p.m.
Registration & Lunch

12:45 – 1 p.m.
Opening Remarks

1 – 1:45 p.m
The Retirement Income Imperative: From Research to Reality
The evidence supporting guaranteed lifetime income has never been stronger, yet advisor adoption continues to lag. This session explores the research underpinning retirement income strategies and demonstrates how those insights can be translated into practical frameworks for portfolio construction, client conversations, and retirement income planning.

1:45 – 2:45 p.m.

Show Me: How Annuities Actually Get Into a Portfolio

This session follows a real client implementation, from identifying the retirement income need and selecting an annuity solution to integrating it into the portfolio and navigating the operational steps required to put the recommendation into action. The discussion then shifts to the broader opportunity: what will it take to make this process simpler, more scalable, and easier for advisors to adopt?

2:45 – 3:15 p.m

Networking Break

3:15 – 3:55 p.m.

Decumulation and the Evolving Advice Model

Demand for pension-like retirement income continues to grow, yet adoption remains uneven, and many clients still lack a clear path from accumulation to decumulation. This session moves beyond the market trends to examine how advisors are evolving their approach to retirement income planning, where guaranteed income solutions are gaining traction across both workplace plans and retail channels, and what is needed to better support clients through this critical transition.

3:55 – 4:35 p.m.

Capital, Competition, and the Future of the Annuity Market

The competitive landscape is changing in ways that go beyond product and distribution. An independent industry expert frames how new capital and new entrants are reshaping the annuity market, followed by a candid discussion of what it means for the firms in the room. IRI's role here is as a neutral convener: not to judge the shift, but to create space for an honest conversation about where the market is heading.

4:35 – 5 p.m.

Closing: What's Next?

The symposium concludes with a forward-looking discussion about the future of the retirement income industry. After a candid exchange on the trends shaping the next five to ten years, IRI leadership will bring the day's insights together, challenge conventional thinking, and leave attendees with a clear call to action. The question is simple: given everything we've heard today, what changes on "Monday morning"?

5 – 6 p.m.

Networking Reception

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