



The Ongoing Move to Defined Contribution and Individual Account Plans: Issues and Implications

Employee Benefit Research Institute
Policy Forum

Washington, DC
December 6, 2001

First session: How Much Income Will Retirees Need?

Fred Munzenmaier, Aon Consulting

Second session: How Much Income Will Retirees Have?

Jack VanDerhei, Temple University and EBRI Fellows Program

Third session: The Impact of EGTRRA on Choice of DB vs. DC Plans

Rob Reiskytl, Hewitt Associates, LLC

Fourth session: Impact of Defined Contribution Participation

Steve Utkus, Vanguard Center for Retirement Research

Fifth session: Impact of Market Volatility on Asset Allocation and Potential for Market Meltdown when Baby Boomers Retire

Alex Sussman, The Segal Company

Sixth session: Impact of Rollovers

John Kimpel, Fidelity Investments

Seventh session: Impact of Post-Retirement Pullout

Rob Henrikson, MetLife

Joe Healy, T. Rowe Price

Ralph Derbyshire, Putnam (invited)

Harry Klaristenfeld, TIAA-CREF

LUNCH

Eighth session: Impact of Social Security Reform

Robert Pozen, President's Commission to Strengthen Social Security

Kathryn L. Moore, University of Kentucky College of Law

Ninth session: What Could Washington Do To Make The Process Easier for Plan Sponsors?

Bill Sweetnam, Benefits Tax Counsel, U.S. Department of the Treasury

Diann Howland, Senior Counsel for the Senate Finance Committee

Paul Zurawski, Deputy Assistant Secretary for Policy, Pension and Welfare Benefits Admin.

Brian Graff, Executive Director for the American Society of Pension Actuaries

Ron Gebhartstbauer, Senior Pension Fellow for the American Academy of Actuaries

Michele Varnhagen, Senior Counsel for the House Education and Workforce Committee