Defined Contribution Plans in a Post-PPA Environment

EBRI-ERF Policy Forum #62

Henry J. Kaiser Family Foundation
1330 G Street NW, Washington, DC 20005
Thursday, May 8, 2008
9:00 a.m. – 12:30 p.m.

Agenda

Coffee and Registration – 8:30am – 9:00am

Panel One: Automatic Enrollment
- Recent Automatic Enrollment Research – Steve Utkus, Vanguard
- The Impact of PPA on Retirement Income for 401(k) Participants
  – Jack VanDerhei, Temple University, and Craig Copeland, EBRI

Panel Two: Qualified Default Investment Alternative (QDIA) and Financial Advice
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  – Allen Steinberg, Hewitt Associates
- Sponsor’s Experiences Using Managed Accounts as QDIAs
  – Christopher Jones, Financial Engines

Panel Three: Impact of the Pension Protection Act of 2006
- Optimal Plan Design for Auto Enrollment Plans after PPA
  – Lori Lucas, Callan Associates, Inc.
- New Information on Auto Escalation and Other Items from a New Survey
  – David Wray, Profit Sharing/401(k) Council of America
- Remaking of the Defined Contribution Market
  – Nancy Szmolyan, McKinsey & Company

Panel Four: Future/Next Stage Initiatives
- The Future of Active Asset Management for Defined Contribution Plans
  – Jerry Bramlett, Benefit Street
- Retirement Income Sufficiency: Shaping the Future – Kelli Hueler, Hueler Companies
- International Experience – Barb Marder, Mercer
- Universal/Automatic IRAs – Mark Iwry, The Brookings Institution