



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**