

# **Decumulation/Retirement Income in Defined Contribution Plans**

*EBRI-ERF Policy Forum #64*

**Henry J. Kaiser Family Foundation  
1330 G Street NW, Washington, DC 20005  
Thursday, May 7, 2009  
9:00 a.m. – 4:00 p.m.**

## *Agenda*

### I. Retirement Wealth Landscape

- Jack VanDerhei and Craig Copeland, EBRI

### II. Decumulation Product Landscape

- Lori Lucas, Callan Associates Inc.

### III. Exploration of Retirement Income Solutions: Moderator: Stacy Schaus (PIMCO)

- Chip Castille, Barclays Global Investors
- Stephen Deschenes, MassMutual
- Mark Foley, Prudential Retirement
- Tom Fontaine, AllianceBernstein
- Jody Strakosch, MetLife
- Elizabeth Heffernan, Fidelity Investments

### IV. Pooling of Guarantees

- Dan Campbell, Milliman Inc.

## **LUNCH**

### V. Panel on Optimization in Terms of Portfolio Products: Moderator: John Cammack, T. Rowe Price

- Chris Raham, Ernst & Young
- Peng Chen, Ibbotson Associates

### VI. Plan Sponsor View

- Jay Vivian, formerly of IBM
- David Wray, Profit Sharing/401(k) Council of America

### VII. Participant View

- John Ameriks, Vanguard Group
- Warren Cormier, Boston Research Group

### VIII. Global Perspective

- Barbara Marder, Mercer

### IX. Policy Perspective

- Diane Oakley on behalf of Congressman Earl Pomeroy (ND)