

EBRI-ERF Policy Forum #70
Henry J. Kaiser Family Foundation
1330 G Street NW, Washington, DC 20005
Thursday, May 10, 2012
9:00 a.m. – 4:00 p.m. (refreshments served at 8:30 a.m.)

Agenda

“After” Math: The Impact and Influence of Incentives on Benefit Policy

Welcome and Introduction – Dallas Salisbury, EBRI

- **Session One: Setting the Stage: The potential impact of changes to current tax incentives for employee benefits (health care and retirement)**
 - Dallas Salisbury (President and CEO, EBRI)
 - Paul Fronstin (Senior Research Associate, EBRI)
 - Joe Antos (Wilson Taylor Scholar in Healthcare and Retirement Policy, American Enterprise Institute)
 - Gretchen Young (Senior Vice President, ERISA Industry Committee)
- **Session Two: What is the “true cost” of tax deferrals?**
 - Karen Smith (Senior Research Associate, Urban Institute)
 - Eric Toder (Codirector, The Urban-Brookings Tax Policy Center)
 - Judy Xanthopoulos (Principal, Quantria Strategies, LLC)
 - Ithai Lurie (Financial Economist, Treasury)
 - Shanthi Ramnath (Financial Economist, Treasury)
 - Jack VanDerhei (Director of Research and Co-Director, Center for Research on Retirement Income, EBRI)
 - Michael Barry (President, Plan Advisory Services Group)
- **Session Three: What do people actually do after retirement with respect to their retirement savings?**
 - Craig Copeland (Senior Research Associate, EBRI)
- LUNCH
- **Session Four: International comparisons – are there lessons to be learned in pension plan design?**
 - Dan Dekeizer (Vice-President and Sr. Actuary – Global Employee Benefits, Center of Expertise, MetLife)
 - Robyn Cameron (Global Leader, International benefits Practice, Mercer)
- **Session Five: What are 401k/DC plans delivering? What levers can be applied to encourage/motivate worker-savers? Will the next generation of savers be better off?**
 - Steve Utkus (Director, Vanguard Center for Retirement Research)
 - Laurie Nordquist (Director, Institutional Retirement & Trust, Wells Fargo)
 - Ed Murphy (Managing Director, Head of Defined Contribution, Putnam)
- **Session Six: How can efficient portfolio approach for retirement income optimization be integrated with plan sponsor options during the accumulation phase?**
 - Chris Raham (Senior Advisor, Ernst & Young)
 - Bob Shaw (Executive Vice President, Individual Markets, Great-West Retirement Services)

Closing Remarks – Nevin Adams, EBRI