PRELIMINARY AGENDA

POWER OF VISION 2017: Annual Meeting and 25th Anniversary

NEW! FORMAT
The Insured Retirement Institute's Annual Meeting and 25th Anniversary: VISION 2017 will offer attendees a new program format. VISION's new program format offers short bites of learning, deeper dives into topic areas, industry panels to incite action, and thought leader discussions. With the option for peer-to-peer learning, in-depth exploration, and best practices across a wide range of subjects and disciplines.

This year the VISION Annual Meeting Planning Committee has decided that the General Sessions will offer a Talk Show Session Format. What does this mean for attendees? The Talk Show Sessions offer conversational panel discussions. These 60-minute panel discussions will be led by a skilled moderator, Candy Crowley, CNN's former award-winning, nonpartisan chief political correspondent and anchor of the Sunday morning talk show *State of the Union with Candy Crowley*. The *Los Angeles Times* called her "no-nonsense" and a "straight shooter," characterizing her career as "sophisticated political observation, graceful writing, and determined fairness." She was also the first woman to moderate a presidential debate in two decades. With years of experience, insider knowledge, and access to the day's top newsmakers. Candy Crowley will serve as the VISION's "talk show host" leading attendees through the past, present, and future as IRI honors our past and defines our future.

Attendees will have the opportunity for Q & A and audience feedback sprinkled throughout the session. Panelists will discuss issues in a conversational format and represent a diverse range of perspectives. The moderator plays an important role in facilitating the panel discussion and bringing the audience into the conversation, like a talk show host. There is no podium and there is no head table.

You won't want to miss out on the industry's premier event! Keep your skill sets competitive and fresh with content from some of the most innovative, inspiring, and creative retirement income leaders in the industry.

Take a look at our tailor-made program just for you!

Schedule At Glance

Sunday, September 24, 2017

1:00 pm – 6:00 pm	Registration
2:00 pm – 5:00pm	IRI Advisor Council Focus Groups (2) ***(Invitation Only)***
2:00 pm – 5:00 pm	Broker-Dealer Roundtable **(Invitation Only)**
2:00pm – 5:00 pm	Ops & Tech Senior Steering Committee **(Invitation Only)**
5:30 pm – 6:00 pm	First-Time Attendee and New Member Reception
6:00 pm – 7:30 pm	Welcome Reception

PRELIMINARY AGENDA

Schedule At Glance

Monday, September 25, 2017	
7:00 am – 4:00 pm	Registration
7:00 am – 8:30 am	• Asset Managers Committee Meeting • Public Relations Committee Meeting • Retirement/Research Committee Meeting • State Affairs Committee
7:30 am – 8:30 am	Networking Breakfast
8:30 am – 9:00 am	• Opening Remarks • Annual Business Meeting • Chairman's Perspective
9:00 am – 10:00 am	Opening General Session **20/20 Vision: Insights From the C-Suite**
10:00 am – 11:00 am	General Session **DOL Lessons Learned: Top 'Aha' Moments**
11:00 am – 11:30 am	Networking Break
	Breakout Sessions
11:30 am – 12:30 pm	• Retirement Reality Check: Why Realism Breeds Optimism in Our Industry • Evolution or Extinction: The Future of Wholesaling • Your Guide to Stress Management
12:30 pm – 2:15 pm	Hall of Fame Luncheon
2:15 pm – 2:30 pm	Transition to General Session
2:30 pm – 3:30 pm	Leadership Session **Embrace and Define Your Leadership Style for the Future** *Jeff Eggers, Organizational Performance Expert*
3:30 pm – 4:00 pm	Networking Break
4:00 pm – 5:00 pm	General Session **The View from Washington: 2017 Outlook and Beyond**
5:00 pm – 6:00 pm	25^{th} Anniversary Opening Celebration

PRELIMINARY AGENDA

Schedule At Glance

Tuesday, September 26, 2017	
7:00 am – 12:00 pm	Registration
7:00 am – 8:30 am	• Retirement Income Committee • Membership Committee
7:30 am – 8:30 am	Breakfast
8:30 am – 9:30 am	Opening General Session **Evolving Technology & Its Impact on Consumers**
9:30 am – 9:45 am	Transition to Break-Out Sessions
	Breakout Sessions
9:45 am – 10:45 am	• Next Generation: The Trailblazers of the Retirement Income Industry • Innovative Solutions to the Retirement Income Challenge • Diversity in Management: Delivering on the Promise of Diversity
10:45 am – 11:15 am	Networking Break
11:15 am – 12:15 pm	General Session **A VISION to the Future** *Mitch Joel, Best Selling Author and Digital Marketing Expert*
12:15 pm – 12:30 pm	Closing Remarks
1:00 pm – 2:30 pm	Executive Committee Meeting ***(By Invitation Only)***
3:00 pm – 5:00 pm	Board of Directors Meeting ***(By Invitation Only)***

GENERAL SESSIONS AND BREAKOUT DESCRIPTIONS

Monday, September 25, 2017

OPENING GENERAL SESSION

20/20 Vision: Insights From the C-Suite

Hear from C-suite executives, industry leaders and distinguished guests from a broad range of disciplines to discuss the most pressing issues confronting the retirement industry today. The discussion will be centered around five key converging forces — demography, society, the economy, policy and the workplace — that are influencing the current and future landscape of the retirement industry.

Today, demographic and societal factors are reshaping the way in which individuals need to think and plan for retirement, while economic challenges and opportunities are altering the dynamics of investing for a secure future. Collectively and in partnership with businesses and government, we in the retirement industry need to seek solutions that will help individuals save more, invest wisely and spend prudently.

The future may be hard to predict, but need not be hard to prepare for. The retirement income industry is grappling with new business challenges emerging from the DOL fiduciary rule implementation. Those who can anticipate and plan for change can create their own future. Others who are 'fast followers' will need to be agile enough to recognize the leaders and adopt similar strategies. The 'survivors' are likely to be focused on short-term performance. Which one are you?

GENERAL SESSION

DOL Lessons Learned: Top 'Aha' Moments

As the insured retirement income industry moves forward and adjusts to new fiduciary standards, our DOL panel of experts will examine the impact the fiduciary rule has had on our industry. Utilizing their unique viewpoints, as legal/regulatory professionals, broker-dealers, & asset managers, these foremost industry thought-leaders will provide a much-needed deep dive into the lessons learned from partial implementation of the rule and offer valuable revelations to help you solidify business strategies and rise to meet new challenges head on.

BREAKOUT SESSIONS

Retirement Reality Check: Why Realism Breeds Optimism in Our Industry

Developed by the IRI Asset Management Committee

The combination of new technologies and shifting demographics and client needs is bringing a sea of change to the asset management industry. Join IRI's Asset Managers Committee and industry thought-leaders to discuss ─ what does the successful asset manager of the future look like? Additionally, how can we develop a compelling value proposition to retirees? Explore the psychology of the investor today, why insurance companies are uniquely positioned, how broker-dealers are reframing their financial planning focus, and the critical role asset managers' play.

Evolution or Extinction: The Future of Wholesaling

The wholesale distribution industry is at an inflection point of rapidly changing business fundamentals. To turn the challenges into an advantage, distributors should have a framework for action. This panel will offer diverse perspectives from an advisor, a distributor, and a manufacturer. Gain insights into distribution disruption and the myriad forces that are shaping the industry. Hear unique perspectives and best practices to achieve, identify, and reach the best outcomes.

Your Guide to Stress Management

Stress is a necessary part of survival in our industry. Physical and emotional demands continually bombard us. Learn how to effectively manage stress. The more tools you have at your disposal, the better you will be able to cope with the stress you experience on a daily basis. This session offers you the chance to hear from an expert on stress management in the corporate environment.

GENERAL SESSIONS AND BREAKOUT DESCRIPTIONS

Monday, September 25, 2017 (continued)

LEADERSHIP SESSION

Embrace and Define Your Leadership Style for the Future

Jeff Eggers, Organizational and Performance Expert

Challenging times for our industry have created a landscape in which retirement income professionals must do more with less while delivering better results. As the leaders in your field, this session will focus on your workplace view to be more self-directed and self-driven. You will learn how empathy, humility, adaptability and rationality all comprise an effective leader.

GENERAL SESSION

The View from Washington: 2017 Outlook and Beyond

Featuring government affairs experts, this session will pull back the curtain on Washington and offer analysis on how the current political environment is impacting our industry. In conjunction with a short – to – *Midterm* outlook, our panel of leading government affairs professionals will discuss how IRI and the industry are currently working with key players in Washington to effect positive policy change. Let's go behind the spin and get an insider's look into the year ahead and what is on the horizon for our industry and American retirement savers.

Tuesday, September 26, 2017

GENERAL SESSION

Evolving Technology & Its Impact on Consumers

As financial professionals are inundated with data, marketing, personalization, robots, and chatbots, what can be done to make you stand out from the rest? Utilizing the insights of former Silicon Valley executives, we will explore how to get a head in the multidimensional business world of the future. This session will provide you with practical ways to develop new strategies and evolve ahead of the industry**.**

BREAKOUT SESSIONS

Next Generation: The Trailblazers of the Retirement Income Industry

Recognized by their colleagues as the next generation of industry leaders, this panel of select recipients of IRI's Top 25 Influential & Innovative Leaders Under 40 award will be discussing emerging trends in the insured retirement industry. Notable for their capacity to look at challenges in new ways, these seasoned professionals are implementing creative strategies to enhance all aspects of our industry. This session offers you the ability to hear from those your colleagues have chosen to recognize as the next stars of our industry.

Diversity in Management: Delivering on the Promise of Diversity

Join leading thought-leaders to discuss the importance of diversity in the financial services industry. The unique perspectives offered by all genders, races, and cultures can be used to implement the innovations necessary to move our industry forward into the 21st Century. We'll kick off the session by explaining that diversity must be looked at through different lenses: "inherent diversity" (including age, race, gender, ethnicity, and physical ability) and "acquired diversity" (including language ability and military service, etc.) Together we'll examine the challenges and opportunities to better understand how we ensure firms go beyond just discussing diversity to ensure a workforce that reflects clients.

Innovative Solutions to the Retirement Income Challenge

Evolving technology and digital disruption are topics that are top of mind for many of our members. We'll share insights and trends changing the face of our industry. More importantly, how organizations can connect to an always-connected consumer. Additionally, we'll explore what do platforms look like in this post-DOL world.

GENERAL SESSION

A VISION to the Future

Mitch Joel, Best Selling Author and Digital Marketing Expert

The financial advice industry faced some significant headwinds in 2016 from the rise of competition from robo-advisers to the historic expansion of regulation under the Department of Labor's fiduciary rule. Although the economic and public policy outlook is murky, thanks to the largely unexpected victory of President Donald Trump, 2017 could be the year that holistic retirement planning becomes the norm. What's our industry vision for the future? We'll gain insights on the future of technology and business, including how to use big data to create brand loyalists, how to drive growth in a mobile world, the five technology trends changing the face of business, and how organizations can connect to an always-connected consumer.