



# Powerful INSIGHTS into the Future of Retirement Income

## Traditional Retirement Planning Failed – How Will a New Approach Work?

*Find out at the 2009 Retirement Income Industry Association's Annual Meeting*

October 5 – 6, 2009

Hyatt Harborside, Boston

When the bottom dropped out of our economy last fall, it became clear that traditional retirement planning didn't work. Through RIIA's unique "View Across Silos", a new cutting-edge paradigm is being built for long term future success.

Join RIIA members and non-members for a one-of-a-kind opportunity to review and discuss the RIIA Advisory Process. This innovative, comprehensive approach for advisors and companies to follow helps investors through the "new normal" of today's retirement income and management challenges. It is creating a buzz across the industry. You will get all of the details at the annual meeting, plus have an opportunity to participate in the latest discussions among the industry leaders.

You'll hear the latest updates on:

- the training and certification for two new Retirement Income designations,
- the research findings in the retirement income industry,
- the assessment of new products and tools and how they incorporate best practices (or not!).

Keynote speakers include two distinguished authors, Sam Khoury and Howard Bloom.

The Awards Dinner is an excellent opportunity to meet retirement income experts from across the industry. And, you won't want to miss the awards! See who is making a big difference communicating the importance of retirement income planning to consumers, advisors and plan sponsors!

## 2009 RIIA ANNUAL MEETING AND AWARDS DINNER

**GOLD**

We thank our GOLD sponsors:

- Allianz
- Merrill Lynch Global Wealth Management

for their commitment and leadership in RIIA and the retirement income industry

**NEW**

*Each registered attendee will receive a copy of Francois Gadenne and Mike Zwecher's revolutionary new book containing the RIIA Advisory Process.*

*(see back for agenda)*

**REGISTER TODAY @**

[www.RIIA-USA.org](http://www.RIIA-USA.org)

For questions or more information:

Call: 617.342.7390

Email: [staff@riia-usa.org](mailto:staff@riia-usa.org)

# Agenda

## Monday, October 5, 2009

- 1:30 PM - 2:00 PM **Registration for Afternoon Pre-Conference**  
 Pre-Conference is for Members Only
- 2:00 PM - 2:30 PM **Opening Remarks** - Francois Gadenne
- 2:30 PM - 3:30 PM **The Book – The 5 Spokes** – Francois Gadenne
- 3:30 PM - 4:30 PM **Structured Book Discussion**  
 Roundtable
- 4:30 PM - 5:00 PM **Training and Certification** – Steve Mitchell, Charles Robinson  
 Review of RMA, RMP certification requirements
- 5:00 PM - 6:00 PM **2009 AMAD Cocktails** – evening hosted by David Macchia
- 6:00 PM - 6:45 PM **Gold Sponsor Keynote:** Mark Benson, Merrill Lynch Global Wealth Management
- 6:45 PM - 7:30 PM **Keynote: Howard Bloom, author**  
*The Genius of the Beast, Global Brain, The Lucifer Principle*
- 7:30 PM - 8:30 PM **2009 RIIA Awards Dinner** – co sponsored by Allianz and Merrill Lynch Global Wealth Management
- 8:30 PM - 9:00 PM **The RIIA AWARDS**  
 Retail Communications Award by InvestmentNews  
 DC Communications Award by PlanSponsor  
 Best Advertising Award by InvestmentWires
- 9:00 PM - 10:00 PM **Dessert Buffet and After Dinner Drinks**

## Tuesday, October 6, 2009

- 7:30 AM - 8:00 AM **Breakfast and Registration** - sponsored by Boston University
- 8:00 AM - 8:45 AM **Welcome/Book recap/RMA Overview** – Francois Gadenne
- 8:45 AM - 9:30 AM **Gold Sponsor Keynote** – Bruce Wolfe, Allianz
- 9:30 AM - 9:45 AM **Achievement in Applied Retirement Research**  
 Ken Silber, Research Magazine–Presenter  
 Laurence J. Kotlikoff, Recipient
- 9:45 AM - 10:15 PM **Networking Break**
- 10:15 AM - 10:45 AM **RIIA Research** – Elvin Turner, Larry Cohen, Jeffrey Cohen  
 RIIA Research Committee's latest advances
- 10:45 AM - 11:45 AM **Industry Research Panel** – Elvin Turner, moderator  
 Panel of industry researchers answer pressing questions
- 11:45 AM - 12:00 AM **Research Resources Committee** – Judy Zaiken, Anna Rappaport
- 12:00 AM - 12:15 AM **Employment Committee** - Laura DiFraia, David Freitag
- 12:15 PM - 1:30 PM **Lunch & Networking** – co-sponsored by Allianz and Merrill Lynch Global Wealth Management  
 Luncheon Speaker: Sam Khoury; introduction by Greg Cherry
- 1:30 PM - 2:15 PM **Innovations Panel** – Ernst & Young, moderator  
 New Products and Tools
- 2:15 PM - 2:30 PM **Regulatory Overview** – Joan Boros
- 2:30 PM - 2:45 PM **Methodologies Committee** – Richard Fullmer
- 2:45 PM - 3:00 PM **Social Networking Committee** – Anand Rao
- 3:00 PM - 3:30 PM **RIIA Committees Updates** – Steve Mitchell  
 Membership Committee – David Macchia  
 Communications Committee – Marcia Mantell, Kazi Ariff
- 3:30 PM - 3:40 PM **Closing Remarks** – Steve Mitchell

# Registration and Event Pricing

Each Member/Company receives one free admission as part of their membership dues.

If you are not a member, **this is an excellent time to join.** (Member Firms receive one free admission to this event as part of their membership.)

## Members Pricing

In person:	Complimentary (1/membership)
Additional Attendee with Member Firm:	\$350 ( <b>\$299 before August 31</b> )
Additional Attendee with Financial Advisor:	\$199
Graduate Student:	\$50 (with approval, contact <a href="mailto:staff@riia-usa.org">staff@riia-usa.org</a> )

## Non-members Pricing

In Person:	\$995 (\$900 before August 31)
Financial Advisor In person:	\$199
Press	by Approval (Contact <a href="mailto:staff@riia-usa.org">staff@riia-usa.org</a> )

Book your hotel accommodations early at the Harborside Hotel to get the discounted rate. Details are on the RIIA website at [www.riia-usa.org](http://www.riia-usa.org).

## **RIIA Awards**

The RIIA Awards Dinner will highlight the industry's best communications, marketing materials, advertising and promotion campaigns. Make sure to submit your entries to be considered for the "2009 Excellence in Retirement Income Communications" awards. Call 617-342-7390 or Email: [staff@riia-usa.org](mailto:staff@riia-usa.org) for more information.

### **Cancellation Policy:**

If we receive your request to cancel 30 days or more prior to the conference start date, your registration fee will be refunded minus a \$25 administrative fee (per paid attendee canceled). Cancellations occurring after Labor Day (September 7, 2009) will receive a 60% refund (per paid attendance canceled).