

RIIA PRESENTS THE 2017 SUMMER CONFERENCE AND RMA® MASTER CLASS  
**Mapping Solutions for the DOL's Fiduciary Rule and Beyond**  
**Conference Agenda at a Glance**



	Conference • July 17–18, 2017	RMA® Master Class • July 19–20, 2017
	SALEM STATE UNIVERSITY, SALEM, MA	

HOST



**DAY ONE: Monday, July 17** Pre-Conference Activities

10:00 AM–12:00 PM	Pre-Conference RMA® CE Session (RMA® Graduates and RMA® Candidates) Pre-Conference RMJ® Peer-Reviewers Meeting. Pre-Conference VLC Authors and Presenters Meeting
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**Conference Sessions**

**Speaker(s)**

12:00–1:00 PM	Buffet Lunch	
1:00–1:45 PM	The Voice of the Client: Are You a Curve, a Triangle or a Rectangle?	<b>Moderator:</b> Patrick Collins, Schultz Collins, Inc. <b>Speaker:</b> François Gadenne, Retirement Income Industry Association
1:45–2:30 PM	The View Across the Silos <sup>SM</sup> : Benchmarking Retirement Advice	<b>Moderator:</b> Knut Rostad, The Institute for the Fiduciary Standard <b>Speakers:</b> M. Wagner, Esq., The Wagner Group, and Michael Kitces, Nerd's Eye View, by video
2:30–3:00 PM	Break	
3:00–3:45 PM	The State of the Retirement Industry and the Role of the RIIA/Collins Wiki in the Value-Chain	<b>Moderator:</b> Joan Boros, Esq., Stradley Ronon Stevens and Young, LLP <b>Speaker:</b> Anand Rao, PricewaterhouseCoopers
3:45–4:30 PM	Finance for Normal People: Behavioral Finance Portfolio Theory	<b>Moderator:</b> Robert Powell, MarketWatch <b>Speaker:</b> Meir Statman, Glenn Klimek Professor of Finance, Santa Clara University
5:00–6:30 PM	Reception and Welcome – Marsh Hall, Room 210	Sponsored by: Salem State University
6:30 PM	RIIA Board Meeting Dinner (by invitation)	Sponsored by: TBD
6:30 PM	Explore downtown Salem – Check conference material for map and restaurant guide	

**DAY TWO: Tuesday, July 18**

8:00–8:30 AM	Breakfast	
8:30–9:15 AM	Retirement Risk Mapping and Risk Management Techniques Allocations: From the Curve to the Triangle to the Rectangle	<b>Moderator:</b> Brenda St. Arnaud, TIAA <b>Speakers:</b> Dan Keady, TIAA
9:15–10:00 AM	The Tool Box: Implementation Process Approaches, Account Location and Product Selections	<b>Moderator:</b> Chad Tennant, MyDeliverablesTeam <b>Speakers:</b> Brent Burns, Asset Dedication, and Branislav Nikolić, Cannex
10:00–10:30 AM	Break	
10:30–11:15 AM	Monitoring Outcomes: The Key Differentiation for Cyborg Advisors	<b>Moderator:</b> Dana Anspach, Sensible Money <b>Speaker:</b> Sameer Jain, ActiveAllocator
11:15 AM–12:15 PM	Lunch	
12:15–1:00 PM	Reaching the Horizon: Lifecycle Planning and Retirement Planning Include End-of-Life Planning	<b>Moderator:</b> Bob Mauterstock, giftofcommunication.com <b>Speaker:</b> Marcel V. Quiroga, TQM Wealth Partners
1:00–1:45 PM	Conference Wrap-Up: Benchmarking the Conference with the Procedural Prudence Map <sup>SM</sup>	<b>Speaker:</b> François Gadenne, Retirement Income Industry Association
1:45 PM	Break and end of conference	