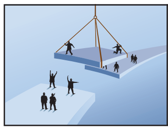
RIIA PRESENTS THE 2017 SUMMER CONFERENCE AND RMA® MASTER CLASS

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

SPONSORS GOLD SILVER BRONZE

DAY ONE: Monday, July 17 Pre-Conference Activities

10:00 AM–12:00 PM	Pre-Conference RMA® CE Session (RMA® Graduates and RMA® Candidates) Note: CE credits are available for RMA®, CFP®, CIMA®, CIMC®, and CPWA®.

	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?	**Moderator:** Patrick Collins, Schultz Collins, Inc. **Speaker:** François Gadenne, Retirement Income Industry Association
1:45–2:30 PM	The View Across the Silos℠: Benchmarking Retirement Advice	**Moderator:** Knut Rostad, The Institute for the Fiduciary Standard **Speakers:** 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: The CTR Wiki in the Value-Chain and Adviser Operations	**Moderator:** Joan E. Boros, Esq., Stradley Ronon Stevens & Young, LLP **Speakers:** Anand Rao, PricewaterhouseCoopers; Colin Lake and Jayven Rappa, Trutelic (home of Advisorflo)
3:45–4:30 PM	Finance for Normal People: Behavioral Finance Portfolio Theory	**Moderator:** Robert Powell, MarketWatch **Speaker:** 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)	
6:30 PM	Explore downtown Salem	

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	**Moderator:** Brenda St. Arnaud, TIAA **Speakers:** Dan Keady, TIAA
9:15–10:00 AM	The Tool Box: Implementation Process Approaches, Account Location and Product Selections	**Moderator:** Chad Tennant, MyDeliverablesTeam **Speakers:** 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	**Moderator:** Dana Anspach, Sensible Money **Speaker:** 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	**Moderator:** Bob Mauterstock, giftofcommunication.com **Speaker:** Marcel V. Quiroga, TQM Wealth Partners
1:00–1:45 PM	Conference Wrap-Up: Benchmarking the Conference with the Procedural Prudence Map℠	**Speaker:** François Gadenne, Retirement Income Industry Association
1:45 PM	Break and end of conference	