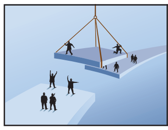
RIIA PRESENTS THE 2017 SUMMER CONFERENCE AND RMA® MASTER CLASS

Mapping Solutions for the DOL's Fiduciary Rule and Beyond

Conference Agenda at a Glance

RETIREMENT INCOME riia® INDUSTRY ASSOCIATION



Conference • July 17–18, 2017 | **RMA® Master Class** • July 19–20, 2017

SALEM STATE UNIVERSITY, SALEM, MA

HOST: Salem STATE UNIVERSITY

SPONSORS: GOLD / SILVER / BRONZE: Nationwide®

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

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

	Conference Sessions	Speaker(s)
12:00–1:00 PM	Buffet Lunch	
1:00–1:45 PM	Listening to the "Voice of the Client" as we look at the View Across the (academic) Silos: Are You a Curve, a Triangle or a Rectangle?	**Speakers:** François Gadenne, CFA®, RMA®, Chairman and Executive Director of RIIA; Patrick Collins, Ph.D., CFA®, Schultz Collins, Inc.
1:45–2:30 PM	Using the "View Across the Silos" to develop your Reasons for Recommendation: Understanding the DOL Rule as a problem of "Account Location" in the Retirement Plan	**Moderator:** Marcia Wagner, Esq., The Wagner Law Group **Speakers:** TBD
2:30–3:00 PM	Break	
3:00–3:45 PM	Using the "Procedural Prudence Map℠" to benchmark reasonable compensation: Matching the RMA®'s 100+ levels of service to the right client types	**Moderator:** Joan Boros, Esq., Stradley Ronon Stevens and Young, LLP **Speakers:** TBD
3:45–4:30 PM	From Accumulation to Decumulation: Lessons from Behavioral Finance	**Moderator:** TBD **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 Only)	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	What is good retirement planning judgement and how can advisors develop it? Making "Distinctions with a Difference℠"	**Moderator:** Dan Keady, TIAA **Speakers:** TBD
9:15–10:00 AM	What are the trending research topics and why? (Feasibility and adaptability replacing sustainability and performance)	**Moderator:** TBD **Speakers:** TBD
10:00–10:30 AM	Break	
10:30 AM–11:15 PM	Adopting Best Practices: How to Accurately Develop the Retirement Budget?	**Moderator:** TBD **Speakers:** Dana Anspach, CFP®, RMA®, Founder, Sensible Money
11:15–12:15 PM	Lunch	
12:15–1:00 PM	Putting it all together: End of Life Planning Documentation	**Moderator:** Marcel V. Quiroga, Founder and CEO, TQM Wealth Partners **Speakers:** Dirk Cotton, The Retirement Café Blog
1:00–1:45 PM	Conference wrap-up: What have we discovered and validated during this conference and what more should we explore as we prepare for next year's conference?	François Gadenne, CFA®, RMA®, Chairman and Executive Director of RIIA®
1:45 PM	Break and end of conference	