



Explore opportunities & strategies for success in the defined contribution – investment-only market at this one-of-a-kind industry event!

Topics at a Glance:

- The Politics of Retirement – A Washington Update
- DC Plan Design and Product Structures for Today & Tomorrow's DC Plans
- Making the Case for Alternatives and ETFs in a DC Plan
- Strategic Product Positioning for Optimum Sales
- The Future of Target Date Funds – Custom, Open Architecture, and Beyond
- The Evolution of Distribution in the DC Market
- Managing Illiquid Assets with Liquid Strategies
- Fallout of 408(b) (2) - The Effects of Fee Disclosure
- Innovative Plan Design Structures that Address the Retirement Challenge
- Collective Investment Trusts – Are They for Everyone?
- Taking on the Fiduciary Standard

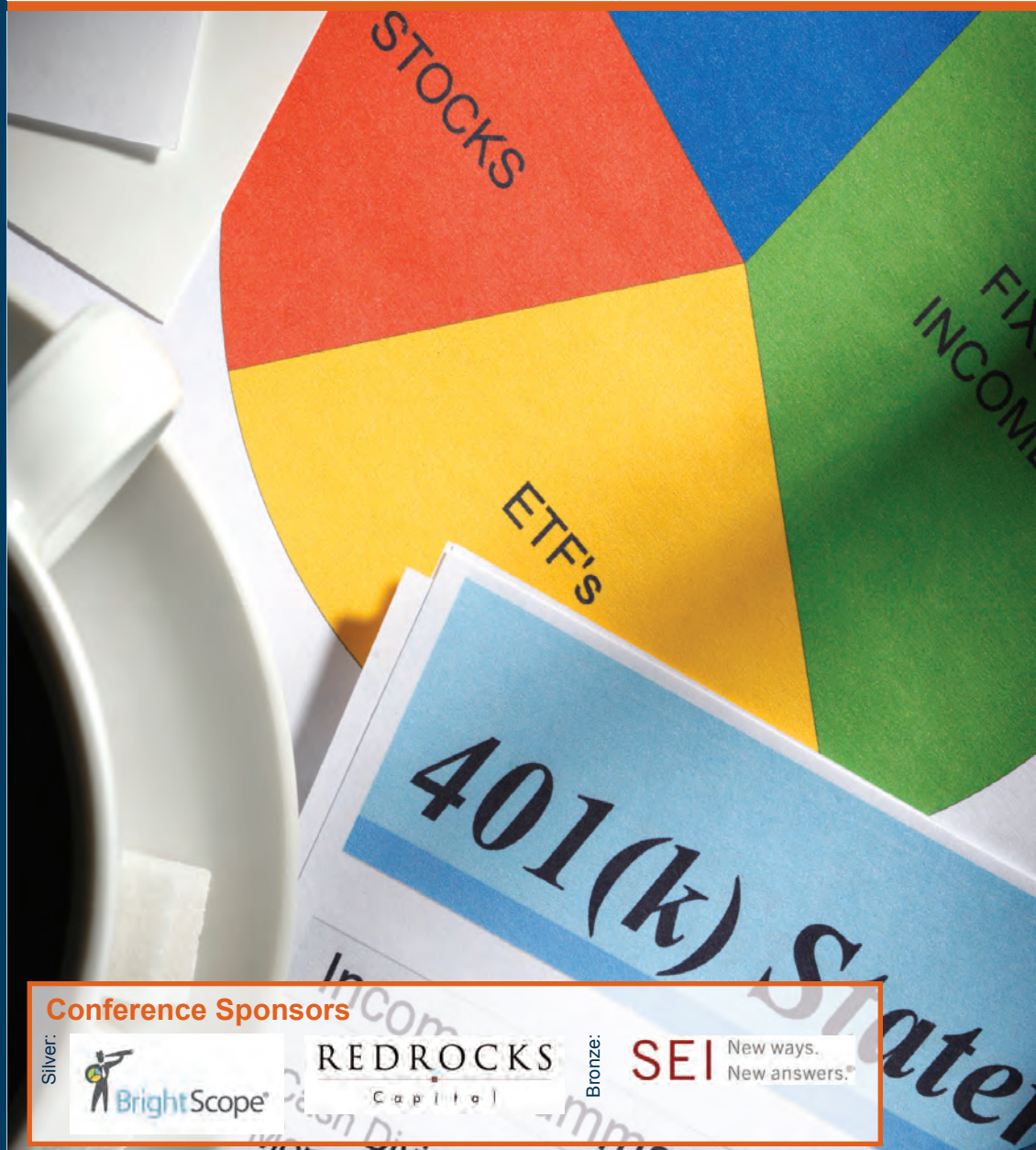
Plus – New This Year!

- Making Headway in the Mid-Tier Consultant Space
- Rethinking Fixed Income
- Addressing Inflation Protection in DC Options
- Challenges in Sales Tracking and Other Operational Issues

January 28-29, 2013
The Harvard Club, Boston

Profit-Driven Strategies in the DCIO Market

*Increase the Profitability and Potential of Your
Investment-Only Business*



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The Conference Organizer

Financial Research Associates provides the financial community with access to business information and networking opportunities. Offering highly targeted conferences, FRA is a preferred resource for executives and managers seeking cutting-edge information on the next wave of business opportunities. Please visit www.frallc.com for more information on upcoming events.

The Maturing DC Market Holds a Wealth of New Opportunities - and Challenges - for the Investment-Only Manager

Are You Positioned to Capture the Opportunities and Meet Today's Challenges?

Financial Research Associates' 6th Annual **Profit-Driven Strategies in the DCIO Market** is back in Boston with a redesigned agenda that reflects the significant changes we've seen in the DCIO space over the past year. This highly anticipated industry event offers you an up-to-the-minute view of the investment-only industry today – the problems and the potential.

Whether you are already established in the DCIO market, just starting out, or considering entering this profitable space, our program will provide you with indispensable takeaways, insights and strategies to survive and thrive in the evolving DCIO market.

Get the inside track from DCIO industry innovators, retirement platforms, advisors, and consultants on everything from the effects of fee disclosure, to the latest news in products, strategies, and regulations.

You will hear about:

- The growth of custom target date funds
- Innovative distribution options
- How the fee disclosure regulations have affected DCIO
- The latest trends in product strategies and development
- A closer look at DC plan structures and products
- Best practices for getting your operational processes running smoothly
- ETFs and alternatives; where they fit in TDFs and DC plans
- Why building brand recognition is important to your distribution strategy
- What it means to take on the fiduciary standard
- And much more!

This event offers more practical and applicable solutions for increasing the prosperity and success of your DCIO business than any other in the industry. Don't miss your chance to profit from the wealth of information available to attendees at this rewarding event.

Register today! Call 800-280-8440 or register online at www.frallc.com.

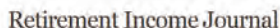
Sincerely,

Christine Marez

Christine Marez, Conference Director
FINANCIAL RESEARCH ASSOCIATES, LLC

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Our Renowned Speaking Faculty

Tom Douglas, **ING**
 Thomas Darnowski, **THE HARTFORD**
 Chris Brown, **SWAY RESEARCH LLC**
 James Folwell, **NUVEEN INVESTMENTS**
 Joshua Melzer, **SENTINEL BENEFITS & FINANCIAL GROUP**
 Steve Ferber, **PIMCO**
 Steven Dorval, **NEW YORK LIFE INVESTMENTS**
 David Eisenberg, **MERCER**
 Mark Fortier, **ALLIANCEBERNSTEIN DEFINED CONTRIBUTION INVESTMENTS**
 Mark Dence, **COLUMBIA MANAGEMENT**
 Robert Lamb, **NEW YORK LIFE RETIREMENT PLAN SERVICES**
 Gib Watson, **PRIMA CAPITAL HOLDING**
 Michael Wands, **PUTNAM INVESTMENTS**
 James Brockelman, **PUTNAM INVESTMENTS**
 Todd J. Cassler, **JOHN HANCOCK FUNDS**
 Bill Feldmaier, **CPI QUALIFIED PLAN CONSULTANTS INC.**
 Jonathon Dues, **MESIROW FINANCIAL**
 Adam Sokolic, **LPL FINANCIAL**
 Lucas M Barton, **LOCKTON COMPANIES, LLC**
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 Kenneth G.Y. Grant, **NORTHEAST RETIREMENT SERVICES INC. and GLOBAL TRUST COMPANY**
 Marcia Wagner, **THE WAGNER LAW GROUP**
 Frank Paone, **LORD ABBETT & CO**
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 Daniel A. Notto, **ALLIANCEBERNSTEIN INVESTMENTS, INC.**
 Terence B. Shea, **JOHN HANCOCK FUNDS**
 Kerry Pechter, **RETIREMENT INCOME JOURNAL**
 Cleo C. Chang, **WILSHIRE FUNDS MANAGEMENT**
 Jeremy Ross, **BRIGHTSCOPE INC.**
 Matthew Radgowski, **WILSHIRE FUNDS MANAGEMENT**
 Michael Raso, **OLD MUTUAL ASSET MANAGEMENT**
 Joel Lieb, **SEI**
 Ryan Mullen, **MFS FUND DISTRIBUTORS, INC.**
 Daniel J. Beckman, **FIDELITY FINANCIAL ADVISOR SOLUTIONS**
 Amy Glynn, **PENSION RESOURCE INSTITUTE**
 Phillip Senderowitz, **401K ADVISORS**
 Jody Strakosch, **STRAKOSCH RETIREMENT STRATEGIES, LLC**
 Kevin Vandolder, **HEWITT ENNISKNUPP**
 Mark J. Foley, **PRUDENTIAL RETIREMENT**
 David Ireland, **STATE STREET GLOBAL ADVISORS**
 Mark Sunderhuse, **RED ROCKS CAPITAL**

Who Should Attend?

This conference is designed for defined contribution professionals including (but not limited to):

- Asset managers
- Investment management professionals
- Fund managers
- Retirement platform executives
- Product development executives
- Retirement specialists
- Consultants and advisors
- National sales and marketing teams
- Legal professionals

Top Reasons to Attend

Asset managers:

- Gain practical knowledge for building an effective DCIO business
- Get the inside track on how to be chosen by the right platforms
- Develop sound pricing strategies
- Discover effective value-add tools

Platforms, Consultants, and Advisors:

- Hear the latest in product development and strategies
- Find out who you want on your platform

All DCIO Professionals:

- Find out how new disclosure and transparency regulations will affect DCIO
- Get an industry overview from multiple perspectives
- Find out what the industry is doing to cope with the growing retirement population
- NETWORKING!

To Register: Call 800-280-8440 or visit us at www.frallc.com

Day One: Monday, January 28, 2013

8:00 – 9:00

Exhibits Set-Up, Registration, & Continental Breakfast

8:45–9:00

Chair's Welcome

TBD

9:00 –10:00 **Opening Keynote Industry Overview**

The Politics of Retirement – A Washington Update

As Washington gears for action to combat the looming middle class retirement crisis and the long-festering federal deficit, the pension industry landscape is shifting. This session will review proposals by policymakers to increase retirement savings, including automatic enrollment and investment features, as well fee transparency and non-conflicted participant investment



Marcia Wagner, *Managing Partner*, **THE WAGNER LAW GROUP**

MARCIA S. WAGNER is a specialist in pension and employee benefits law, and is the principal of The Wagner Law Group, one of the nation's largest boutique law firms, specializing in ERISA, employee benefits and executive compensation matters, which she founded over 16 years ago. For the past five years, 401k Wire has listed Ms. Wagner as one of its 100 Most Influential Persons in the 401(k) industry, and she has received the Top Women of Law Award in Massachusetts and is listed among the Top 25 Attorneys in New England by Boston Business Journal. Ms. Wagner has written hundreds of articles and 13 books about retirement and benefit plans. Ms. Wagner is widely quoted in such publications as The Wall Street Journal, Financial Times, Pension & Investments, and more, as well as being a frequent guest on FOX Business, CNN, Bloomberg, NBC and other televised media outlets.

10:00 -11:00

DC Plan Design and Product Structures for Today & Tomorrow's DC Plans

Sponsors are changing the way their plans are designed, reducing the number of core options and moving away from the style box. This session will discuss how plan design is changing, the coming impact on existing managers, and new opportunities that are becoming available.

Steve Ferber, Senior Vice President, Defined Contribution, **PIMCO**

11:00 – 11:15

Break

11:15 – 12:00

Strategic Product Positioning for Optimum Sales

- Differentiating your sales strategy
- The importance of building brand recognition to achieve your distribution strategy
- Getting your fund on the analysts' radar
- Working with gatekeepers to address participant needs

Jim Folwell, *SVP - Director of Business Development, DCIO and Strategic Platforms* **NUVEEN INVESTMENTS**

Mark Dence, *Vice President National Sales Manager Investment Only, Intermediary Distribution*, **COLUMBIA MANAGEMENT**

Terence B. Shea, AIF®, CIMA®, *Managing Director*, **JOHN HANCOCK FUNDS**

12:00 -1:00

Luncheon for all attendees & speakers

1:00 – 1:30

Managing Illiquid Assets with Liquid Strategies

- Evolution of liquid strategies
- Utilizing liquid strategies in Target Date Funds and Model Portfolios
- Management considerations including rebalancing and hedging

Mark Sunderhuse, *Managing Director and Co-Founder*, **RED ROCKS CAPITAL**

1:30 – 2:15

Making Headway in the Mid-Tier Consultant Space

- The key to pursuing distribution of mid-tier plans
- How to serve the particular needs of mid-tier consultants
- Whom do consultants prefer to work with: consultant relations or DCIO sales?

Lucas M Barton, *Vice President*, **LOCKTON COMPANIES, LLC**

Michael E. Goss, *Executive Vice President*, **FIDUCIARY INVESTMENT ADVISORS**

Two-Part Target Date Spotlight

2:15 – 3:00 **Part One**

The Future of Target Date Funds

- The evolution of the target date fund
 - Sub-advised/multi-manager TDFs
 - The increase in non-proprietary vehicles
 - The growth of custom TDFs
 - Innovations in the glide path
- Is open architecture creating opportunities in the TD space?
- Where are the prospects for growth?
- Dynamic administration of waterfalls & trading
- Who's creating custom TDFs, and who is selling them?
- Where is the market?
 - How to make "going custom" easier for plan sponsors
 - Examining the opportunities created by consultant and RIA-built custom TDFs

Moderator:

TBD

Kenneth G.Y. Grant, *Chief Officer Corporate Development*, **NORTHEAST RETIREMENT SERVICES INC.** and **GLOBAL TRUST COMPANY**

David L Eisenberg, CFA, *Principal, U.S. Segment Leader, Wealth Management*, **MERCER**

Robert Lamb, CFA, *Director, Investment Client Services*, **NEW YORK LIFE RETIREMENT PLAN SERVICES**

3:00 – 3:15

Networking Break

3:15 – 3:45 **Part Two**

The Target Date Equity Dilemma

- Target Dates are not a commodity and substantial differences exist between them
- The Equity solution
- The anomaly that exists in traditional financial theory
- The case for investing in low volatility strategies
- The three approaches to low volatility investing

Michael Raso, *SVP, Institutional Retirement and Subadvisory*, **OLD MUTUAL ASSET MANAGEMENT**

3:45 – 4:30

Making the Case for Alternatives and ETFs in a DC Plan

- Why alternatives are gaining momentum in every market – except in 401K plans
- How do alternatives and alpha-seeking products fit into the DC line-up?
- Can DC follow the DB and RIA lead in embracing alternatives?
- Risks and benefits of including alternatives in a plan's construction
- Risks and benefits of including ETFs in a plan's construction
- Diversification and differentiation of varied AI substrategies
- How do they impact the structure of a portfolio?
- Due diligence and getting the right investments into the portfolio to create the needed correlations

Moderator:

Robert Lamb, CFA, *Director, Investment Client Services*, **NEW YORK LIFE RETIREMENT PLAN SERVICES**

Panelists:

Gib Watson, *President*, **PRIMA CAPITAL HOLDING**

Cleo C. Chang, *Managing Director, Head of Investment Research*, **WILSHIRE FUNDS MANAGEMENT**

Phillip Senderowitz, *Senior Plan Consultant*, **401K ADVISORS**

4:30- 5:15

Rethinking Fixed Income

- Reconsidering how to allocate fixed income as participants move towards redemption
- Assessing traditional fixed income allocations in the event of a rise in interest rates
- Considering the short fixed income product
- What kind of fixed income offerings can be added to complement a domestic core?

Michael Wands, *Senior Investment Director, Fixed Income*, **PUTNAM INVESTMENTS**

Daniel J. Beckman, CFA, *Senior Vice President*, **FIDELITY FINANCIAL ADVISOR SOLUTIONS**

5:15

Day One Sessions Adjourn

Day Two: Tuesday, January 29, 2013

8:00-9:00 Continental Breakfast

9:00 – 9:15

Chair's Welcome & Recap of Day One

Chairperson:
TBD

9:15 –10:15

The Evolution of Distribution in the DC Market

- Distribution channels and options
 - The recordkeeping platforms
 - Wirehouse and independent B/D-based retirement advisers
 - Wholesaling teams
 - Advisors and RIAs
- The consultant channel
 - Benefits of going through a consultant
- Are the consultants and RIAs gaining more influence?
- Selling directly to the plan sponsor
- Impact of recordkeeper consolidation on distribution
- Targeting the right distribution channel for your offering

Moderator:
Chris Brown, *Founder and Principal*, **SWAY RESEARCH LLC**

Panelists:
James Brockelman, *National Sales Manager, Advisor Sold Defined Contribution* **PUTNAM INVESTMENTS**

Todd J. Cassler, *Senior Managing Director, Head of Institutional Sales*, **JOHN HANCOCK FUNDS**

Bill Feldmaier, *National Sales Director*, **CPI QUALIFIED PLAN CONSULTANTS INC.**

Adam Sokolic, AIF®, PPC, *Senior Vice President Retirement Partners*, **LPL FINANCIAL**

10:15 –11:15

Fallout of 408(b) (2) - The Effects of Fee Disclosure

- The necessity of share class flexibility
- R6 and zero revenue share class funds
 - What should these look like?
 - Will these eventually replace other share classes?
- How are plan sponsors reacting to the new fee disclosures?
 - What will a surge in recordkeeper changes mean for asset managers: new opportunities or lost revenue?
 - The increased importance of communicating your value as fees are disclosed
 - How to educate advisors so they can educate plan sponsors and consultants
- Are we seeing a more equitable distribution of fees?
- What can firms do to work with recordkeepers on fee disclosure?
 - Reconciling lower fees with high recordkeeping costs?
- Can smaller firms compete?

Moderator:
Ryan Mullen, *Senior Managing Director*, **MFS FUND DISTRIBUTORS, INC.**

Frank Paone, *Director, Platform Manager*, **LORD ABBETT & CO**

Phyllis Klein, *Senior Director, Consulting Research Group*, **CAPTRUST FINANCIAL ADVISORS**

Daniel A. Notto, *Senior Vice President and Senior Retirement Plan Counsel*, **ALLIANCEBERNSTEIN INVESTMENTS, INC.**

11:15 -11:30 Break

11:30 – 12:15

Innovative Plan Design Structures that Address the Retirement Challenge

- Creating a retirement policy statement
- What is the right tool for the job?
- Are Qualified Default Investment Alternatives enough?
- Solving the problem of retirement income
- Income generating products
 - Annuities
 - Imbedded income
 - Guaranteed income

Moderator:
Jody Strakosch, *Principal*, **STRAKOSCH RETIREMENT STRATEGIES, LLC**

Kevin Vandolder, *National DC Practice Leader*, **HEWITT ENNISKNUPP**

Mark Fortier, *Head of Product and Partner Strategy*, **ALLIANCEBERNSTEIN DEFINED CONTRIBUTION INVESTMENTS**

Kerry Pechter, *Editor*, **RETIREMENT INCOME JOURNAL**

Mark J. Foley, CFA, *Vice President, Institutional Income*, **PRUDENTIAL RETIREMENT**

12:15–1:15 Luncheon for All Attendees

1:15 –2:00

Collective Investment Trusts – Are They for Everyone?

- Pros and cons of collective trusts
- Will the new fee disclosure rules be a boon or a bust for collective trusts?
- The challenge of omnibus reporting
- Getting collective trusts into the mid to lower sized plans

Joel Lieb, *Investment Manager Services*, **SEI**

2:15 –3:00

Addressing Inflation Protection in DC Options

- Why inflation protection is important to consider in today's market
- How is inflation currently being addressed in core and default options?
- What is the potential cost of neglecting to consider inflation protection?
- How much inflation protection is built into current TDF and plan offerings? Is it enough to impact performance?
- Which asset classes and fund structures are sponsors buying in the market today?

Thomas J. Darnowski III, CFA, *Managing Director, Investment Advisory Group*, **HARTFORD FUNDS**

David Ireland, CFA, *Director of US Defined Contribution Investment Strategy*, **STATE STREET GLOBAL ADVISORS**

3:00 – 3:15 Networking Break

3:15 –4:00

Taking on the Fiduciary Standard

- Advantages to becoming a fiduciary
 - What the 3(38) responsibilities, advantages, and liabilities
 - What are the advantages and limitations of a 3(21)
- How the fiduciary standard has changed the way plan sponsors invest

Jonathon Dues, *Senior VP, Business Development, Investment Strategies*, **MESIROW FINANCIAL**

Matthew Radgowski, *Managing Director*, **WILSHIRE FUNDS MANAGEMENT**

Amy Glynn, *Founder and President*, **PENSION RESOURCE INSTITUTE**

4:00 –4:45

Challenges in Sales Tracking and Other Operational Issues

- Creating a more transparent data tracking system
- Getting your data to connect back to your sales numbers
- Determining where the source of a sale is coming from
- Dealing with opaque recordkeeper reports
- Why omnibus accounting is favored by recordkeepers – and what to do about it

Adam Sokolic, AIF®, PPC, *Senior Vice President Retirement Partners*
LPL FINANCIAL

Jeremy Ross, *Head of Sales,*
BRIGHTSCOPE INC.

4:45 Conference adjourns

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We are an independent data, analytics, and software company driving the growth of data-driven decision-making for leading firms in the financial services marketplace.

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We build best-in-class software solutions that drive more effective sales and retention strategies for top financial institutions by leveraging an unparalleled fusion of proprietary data, analytics, and engineering expertise.

Why We Build It

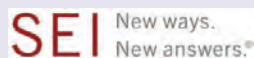
We are committed to bringing transparency to opaque markets and driving the world's smartest financial decisions.



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The 6th Annual Profit-Driven Strategies in the DCIO Market

January 28 & 29, 2013

The Harvard Club of Boston

374 Commonwealth Avenue
Boston, MA 02215
617-536-1260

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Fees and Payments:

The fee for attendance at **The 6th Annual Profit-Driven Strategies in the DCIO Market** is: \$1895

There is an early bird discount of \$200 off if registering before December 14, 2012

Please make checks payable to Financial Research Associates, and write code B836 on your check. You may also pay by Visa, MasterCard, Discover, or American Express. Purchase orders are also accepted. Payments must be received no later than **January 21, 2013.**

Team Discounts:

- Three people will receive 10% off.
- Four people will receive 15% off.
- Five people or more will receive 20% off.

In order to secure a group discount, all delegates must place their registrations at the same time. Group discounts cannot be issued retroactively. **For more information, please call Whitney Betts at 704-341-2445 or email wbetts@frallc.com**

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Cancellations:

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 \$250.00 administrative fee. Cancellations occurring between 29 days and the first day of the conference receive either a 1) \$200 refund; or 2) a credit voucher for the amount of the original registration fee, less a \$250.00 administrative fee. No refunds or credits will be granted for cancellations received after a conference begins or for no-shows. Credit vouchers are valid for 12 months from the date of issue and can be used by either the person named on the voucher or a colleague from the same company.

Please Note: For reasons beyond our control it is occasionally necessary to alter the content and timing of the program or to substitute speakers. Thus, the speakers and agenda are subject to change without notice. In the event of a speaker cancellation, every effort to find a replacement speaker will be made.

The 6th Annual Profit-Driven Strategies in the DCIO Market

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Financial Research Associates Proudly Presents the 6th Annual

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