RETIREMENT ROUNDTABLE

OCTOBER 14 | *NEW YORK*



8:00 AM	**Continental Breakfast**
8:30 AM	**Welcome, Opening Remarks & Introductions** **Deb Wetherbee** | Senior Business Development Director | *IMEA* **Ryan Foreman** | Associate Principal, US Solutions| *Broadridge*
9:15 AM	**Industry Update** Kick off the day with a timely look at the retirement marketplace, including key trends, legislative and regulatory developments, participant behaviors, and the forces shaping retirement plan sponsors, advisors, and asset managers. **Shawn O'Brien** | Head of Retirement Insights | *Broadridge*
10:00 AM	**Break**
10:15 AM	**Executive Roundtable Discussion** Participants will participate in candid, peer-to-peer discussions exploring the trends, challenges, and opportunities shaping the future of retirement solutions and strategy.
	Advisor Engagement How are leading firms strengthening relationships with retirement-focused advisors? Participants will discuss evolving advisor needs, successful engagement strategies, educational initiatives, and ways to create greater value throughout the advisor relationship. ***Discussion Leader:*** **John Doyle** | Senior Vice President, Senior Retirement Strategist | *Capital Group*
	Home Office Decision Makers: **Manager Research Teams, Institutional Consultants & RIA Aggregators** Explore how firms are building relationships with the increasingly influential gatekeepers that shape investment decisions. Discussion topics include due diligence, consultant engagement, RIA aggregators, and best practices for earning and maintaining platform access.
11:45 AM	**Lunch**

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12:30 PM — **Executive Roundtable Discussions Continued**

Evolution of QDIA: Personalization & Retirement Income
As retirement needs become more individualized, QDIA strategies continue to evolve. Participants will discuss the growing focus on personalization, retirement income solutions, participant outcomes, and how product innovation is reshaping plan design.
Discussion Leader:
Jennifer Debrosky | Senior Director, Product Manager Multi-Asset Strategies | *American Century Investments*

Evolution of QDIA: Alternatives
Alternative investments are becoming a larger part of the retirement conversation. Join peers to discuss where alternatives fit within defined contribution plans, implementation challenges, fiduciary considerations, and the outlook for broader adoption.
Discussion Leader:
Hazel Durand | Principal, Defined Contribution Distribution | *Apollo Global Management*

2:00 PM — **Open Discussion**
A chance for participants to ask targeted questions of their colleagues, brainstorm possible solutions for the day's discussions and pinpoint best practices.

2:30 PM — **Adjourn**

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