2016 Client Conference Agenda

Hyatt Regency Newport Hotel & Spa
June 17, 2016

TIME	BRENTON HALL
7:45 – 8:30 AM	**Registration & Continental Breakfast**
8:30 – 9:00 AM	***FIA Welcome & State of the Firm*** Mark R. Wetzel, President Michael Goss, Executive Vice President
9:00 – 10:00 AM	***Capital Markets Overview*** **James T. Swanson, CFA** Investment Officer, Chief Investment Strategist MFS Investment Management®
10:00 – 10:15 AM	**15 Minute Break**
10:15 – 11:00 AM	***Real Assets: A Discussion of the Current Environment and a Look Forward*** **Nelson Louie,** Global Head of Commodities, Credit Suisse Asset Management **Shawn Reynolds,** Portfolio Manager Global Hard Assets, VanEck **Christopher Abbate,** Managing Director, Riverstone Credit Partners *Moderator: Michael Chase, Senior Consultant*
11:00 – 12:15 AM	***Embracing Fear*** ***Introduction of 5 concepts called "Missions" designed to help you and your team embrace fear and use it to enhance your ability to succeed in any environment.*** **David Rutherford** Navy Seal Motivational Speaker Behavioral Training Specialist & Author
12:15 – 1:15 PM	**Lunch**

ROOM ->	BRENTON HALL	BALLROOM A	BALLROOM CD
1:15 – 2:15 PM	**From the Office of the CIO: A Portfolio, Market, & Operational Discussion with Endowment Leaders**	**Planning for Healthcare Costs in Retirement**	**Revitalizing Your Pension Strategy – An Innovation in Retirement Plan Design**
	Timothy Jarry CIO College of the Holy Cross **Jay Willoughby** CIO TIFF *Moderator: Devon Francis, CIMA®* *Consultant*	**Peter Kapinos,** Vice President, Head of Client Engagement Empower Retirement™ **Ryan Tiernan** Senior HSA Consultant Access Point HSA **Mary Legg, CEBS, CFP®** Financial Educator Fiduciary Investment Advisors *Moderator: Vincent Smith, AIF®* *Partner & Senior Consultant*	**Rebecca Sielman, FSA, MAAA, EA** Principal, Consulting Actuary Milliman **Kelly S. Coffing, FSA, MAAA, EA** Principal, Consulting Actuary Milliman *Moderator: Kevin O'Brien, CFA* *Senior Consultant*
ROOM ->	**BRENTON HALL**	**BALLROOM A**	**BALLROOM CD**
2:15 – 3:15 PM	**Everything You Do (or Don't) Want to Know About Social Security Benefits**	**Are you Prepared for a DOL Plan Audit?**	**The Reveal Viability Program** ***What is the true liability of an aging workforce and how to address it with plan design.***
	Steve Richardson Regional Communications Director Social Security Administration *Moderator: Andrew Salak* *Associate Director, Wealth Advisory Services*	**Janet Nahorney, CPA** Partner BlumShapiro **Bruce Barth** Partner Robinson & Cole LLP *Moderator: Ryan Gardner* *Managing Partner & Senior Consultant*	**Hugh O'Toole** Senior Vice President Viability Advisory Group *Moderator: Michael Goss* *Executive Vice President*
3:15 – 4:30 PM	**Cocktails**		