The 2010 Retirement Roundtable
Sharing Responsibility for Assuring Long-Term Financial Security
June 15–16, 2010
The Conference Board Conference Center, New York, NY

The Conference Board Retirement Roundtable is designed to provide companies with a highly significant and timely opportunity to network, brainstorm with, and get practical guidance from senior executives from across functions as well as thought leaders regarding practical and actionable ideas. Benefit from the experiences of your peers in:

- Enabling employees to retire comfortably at an appropriate time in their lives
- Motivating employees to share responsibility for their long-term financial security

Interactive (i.e. workshop) discussions will be emphasized. Context will be set on day one with a focus on strategies that make sense for participants’ businesses. Day two will have an applied focus, during which participants will share experiences in implementing strategies and generating, monitoring and measuring outcomes.

Cancellation Policy
Full refunds within three weeks before the meeting. 50% administrative fee up to two weeks before the meeting. No refund after two weeks before the meeting. Confirmed registrants who did not cancel prior to the meeting will be charged the entire registration fee.

Team Discounts per person
For a team of three or more registering from the same company at the same time, take $300 off each person’s registration.

No discounts per registration. Multiple discounts may not be combined.

www.conference-board.org/retirement

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Luncheon 12:30–1:30 pm

**Determining How Much is Enough**

C 1:30–3 pm

- Targets that employers and employees set to provide for a financially secure retirement
- The levels of defined contribution plan commitments and the kinds of plan features that will enable employees to retire at an appropriate age
- The real, eventual costs to an employer if employees do not accumulate enough to retire

**Session Facilitators**

Anna M. Rappaport, Senior Fellow, Pensions and Retirement, The Conference Board
Diane Piktialis, Co-leader, Research Working Group, The Conference Board

Networking Break 3–3:15 pm

**New Retirement Concepts**

D 3:15–4:45 pm

- Opportunities for employers to influence and shape retirement patterns
- Determining whether phased retirements might help meet their talent needs
- Balancing employer and employee needs

**Session Facilitators**

Jerri Sedlar, Senior Advisor, The Conference Board
Anna M. Rappaport, Senior Fellow, Pensions and Retirement, The Conference Board

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**Funding Challenges of the Defined Benefit Plan**

H 2:45–4:15 pm

- Lessons learned in recent years about managing the volatile impact of pension plans on company income statements, balance sheets and enterprise value
- Managing assets and liabilities
- Reducing accrual forfeiture
- Allocating investments to various asset classes
- Approaches to risk management

**Session Facilitators**

Raymond Murphy, Director, U.S. Benefit Plans, Campbell Soup Company
Anna M. Rappaport, Senior Fellow, Pensions and Retirement, The Conference Board

**What Will You Do When You Get Back to the Office?**

I 4:15–5 pm

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**Call Customer Service at 212 339 0345**

www.conference-board.org/retirement
Day One: Strategy
Tuesday, June 15, 2010
Registration and Continental Breakfast 8:30–9 am
Welcome and Introduction 9–9:45 am
Participants identify their priorities today and for the next generation of retirement plans.

Session Facilitators
Anna M. Rappaport, Senior Fellow, Pensions and Retirement, The Conference Board, Chair, Society of Actuaries Committee on Post-Retirement Risks

Balancing Total Remuneration and Individual Responsibility with Workforce Management in an Aging Population
A 9:45–11:15 am
• The role of the employer in enabling employees to move beyond accumulating assets and start focusing on assuring complete lifetime income security
• Helping manage both the health care and the retirement financial risks of a diverse employee population

Session Facilitators
Dawn Kalamaras, Senior Vice President, Benefits Design and HR Policy, HSBC North America Holdings Inc.
Arthur Rosner, Principal, Mercer

Reallocating and Managing Workplace Benefits
B 11:15 am–12:30 pm
• Current approaches to integrated benefits strategies that are flexible enough to help manage both the health care and the retirement financial risks of a diverse employee population
• Putting retiree health & welfare benefits into the mix in a changing environment

Session Facilitators
G. Thomas Welsh, Director, Payroll, Benefits and Human Resources Information Systems, PPG Industries, Inc.
Diane Piktialis, Co-leader, Research Working Group, The Conference Board

Lunch/Gala 12:30–1:30 pm

Dinner at... 5 pm

Day Two: Tactics
Wednesday, June 16, 2010
Networking Continental Breakfast 8:30–9 am

Assuring that Your Workforce is Both Committed and Savvy
E 9–10:30 am
• How employers get their employees ready to take responsibility for their financial security and implement personal plans
• Tactics for improving savings patterns

Session Facilitator
Bob Benish, Vice President, Membership and Operations, Profit Sharing/401(k) Council of America

Making Sure There Will Be Enough
F 10:45 am–12 noon
• Methods of funding and administering benefits
• Reacting to a volatile market
• Rebalancing employee contributions

Session Facilitator
Beth Ewing, Director, Retirement Plans, FedEx Corporation

Making It Automatic
G 1:30–2:45 pm
• Plan designs and procedures that work
• Experience with automatic enrollment and default savings levels and investment allocations

Session Facilitator
Both Ewing, Director, Retirement Plans, FedEx Corporation

Networking Break 2:30–2:45 pm
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Session Sponsor: **MERCE**

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Making Sure There Will Be Enough

F 10:45 am–12 noon

Methods of funding and administering benefits

Session Facilitator:

Amy Reynolds, Partner, Mercer

Luncheon 12 noon–1 pm

Making It Automatic

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Experiences with automatic enrollment and default savings levels and investment allocations

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• Anticipated challenges over the next few years
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• Experiences with automatic enrollment and default savings levels and investment allocations
• Implementation issues
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