Money Management Institute

ANNUITY & INSURANCE SOLUTIONS ROUNDTABLE SERIES

Wednesday, March 24, 2021

3:00 – 4:00 PM ET	**Demonstrating Value: The Consumer and Distribution Perspective** The Insurance industry is at an inflection point that has become more and more pronounced over the past few years. The challenge is being able to demonstrate our inherent value to consumers by delivering defined outcomes that are aligned to their changing needs. This session – designed to break the handcuffs of traditional thinking – explores the industry's strengths and weaknesses with respect to our basic value proposition, distribution, structures, and advisor and client education. The key questions are what are we seeing from an advisor and consumer demand perspective, where does protection come into play, and how can insurance companies help? **Moderator:** **Heather Kelly,** SVP, Head of Advisory & Strategic Accounts, Allianz Life Financial Services **Panelists:** **Mark Hopkins,** Executive Director, Financial Services Consulting, EY **Angie O'Leary,** Head of Wealth Planning, RBC Wealth Management **Phil Pellegrino,** Executive Director, Head of Insured Solutions, UBS

Wednesday, April 28, 2021

11:00 AM – 12:00 PM ET	**Looking Ahead: Portfolio Construction in a Post-Pandemic World** In the context of holistic household financial planning, how should the Insurance sector respond to the escalating volatility in the market? What are the best strategies to "de-risk" portfolios and dampen potential equity volatility? This session looks at the integration of risk management solutions for asset protection and sustainable retirement income planning. Our panelists will debate whether the 60/40 portfolio is dead, the role of buffered ETFs, annuities, and other protection products, and the impact of the pandemic and President Biden's economic and social initiatives. **Moderator**: **Corey Walther**, President, Allianz Life Financial Services **Panelists**: **David Blanchett**, Head of Retirement Research, Morningstar **Erin Botsford,** Founder & CEO, The Advisor Authority **Steve Snyder,** Senior Vice President, Investment Product Management, LPL Financial Services

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Wednesday, May 26, 2021

11:00 AM – 12:00 PM ET	**The Technology Imperative: Tools, Platforms, and the Digital Experience** In the Insurance sector – as across the entire financial services industry – stakeholders up and down the value chain are leveraging technology to provide advisors and their clients with more customized advice, a more intuitive experience, and improved outcomes. Hear from a panel of experts where the Insurance industry needs to step up its tech game to help advisors become successful and what innovations lie ahead in the next five to ten years. **Moderator**: **Tim Munsie**, SVP, Product Strategy and Development, Jackson **Panelists:** **Scott Bowers,** Chief Strategy & Distribution Officer, FIDx **Cheryl Nash,** Chief Executive Officer, Financial Supermarket, InvestCloud **Joe Toledano,** Managing Director, Head of Insured Solutions Group, Morgan Stanley Wealth Management

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