

*EBRI-ERF Policy Forum #72*  
Arnold & Porter LLP  
555 Twelfth Street, NW Washington, DC 20004-1206  
Thursday, May 9, 2013  
9:00 a.m. – 12:30 p.m. (refreshments served at 8:30 a.m.)

*Agenda*

**Decisions, Decisions: Choices That Affect Retirement Income Adequacy**

Welcome and Introduction – Nevin Adams, EBRI

- **Low “Blows”:** What a sustained low-interest rate environment means for retirement savings and retirement income.
  - Michael Davis, Prudential Retirement
  - Stacy Schaus, PIMCO
  - Jack VanDerhei, Employee Benefit Research Institute
  
- **Source Spots:** The impact(s) of the match – contribution timing, sources, and meeting plan objectives.
  - Dan Campbell, Aon Hewitt
  - Lori Lucas, Callan Associates
  - Jeanne Thompson, Fidelity Investments
  
- **Taking Their Lumps:** Helping plans and participants optimize their distribution choices (rollover, drawdown, and annuity options).
  - Sudipto Banerjee, Employee Benefit Research Institute
  - Josh Cohen, Russell Investments
  - Paul Yakoboski, TIAA-CREF

Closing Remarks – Nevin Adams, EBRI