CRAMER ROUNDTABLE SERIES

Annuities

September 12, 2024 | The Cosmopolitan *of* Las Vegas

CRAMER & associates

JackCramer.com

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Jack Cramer**
8:15am	**The State of the Annuity Industry** - Regulatory Updates - Changing Rate Environment - Products and Pricing	**Jason Berkowitz –** IRI **Joe Maringer –** MassMutual Ascend **Melissa Scheuerman –** Corebridge
9:35am	**The Future of Annuities?** - Streamlining the Sales Process - Digital Strategies - Fee-Based Annuities	**Jamie Awe –** Baird **Rich Romano –** FidX
10:50am	**Product Shelf Management** - Product Due Diligence Process - Reducing the Bureaucratic Barriers - Identifying Red Flags	**Matt Chiccuarelli –** Commonwealth **Brian Mack –** Citi **Heather Shaffer –** Huntington
11:45am	**Lunch**	
12:45pm	**Ask Anyone Anything**	**Open Forum**
1:20pm	**Data Presentation**	
2:15pm	**Hot Topics** - Auto-Renewal Products - 1035 Exchanges - Renewal Rates	**Craig Clark –** LPL
3:25pm	**Breakout Session** Share a professional accomplishment from the past year that you are proud of.	**Small Groups**
4:00pm	**Closing Remarks**	**Todd Nixon**

***Times may shift based on group engagement.**