CRAMER ROUNDTABLE SERIES

Annuities

04.08.26 | The Westin Nashville

CRAMER & associates

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Jack Cramer**
8:20am	**State of the Industry** - DOL: What's Next? - Regulatory Updates - Private Equity & Private Credit	**Mike Freeman –** DDW **Wayne Chopus –** IRI **Chuck DiVencenzo –** NAFA
9:50am	**Technology Advancements** - The Acquisition: What Does It Mean? - Removing the Advisor Swivel Chair - AI: Advancements Incoming	**Betsey Grover –** Fidelity **Bill Lucchini –** Hexure **Scott Beshany –** iCapital
11:10am	**Managing Your Product Shelf** - Designing Your Product Menu - Material vs Non-Material Changes - Better Together	**Dan Schulte –** Benjamin F. Edwards **Andy Baker –** Citizens **Will O'Rielly –** Janney
12:00pm	**Lunch**	
1:05pm	**OIDs and Advisory Annuities** - Building an Outsourced Insurance Desk - Advisory Annuities in Action - Finding the Opportunities	**Brian Donahue –** Commonwealth **Erik Schneider –** JW Cole **Julian Saldana –** Lion Street
2:15pm	**Data Presentation**	**Todd Nixon**
2:35pm	**Sales Suitability and Advisor Education** - Telling the Story… Correctly - Automating Supervision - Partnerships Matter	**Lora Brandt –** Farmers Financial **Chris Barr –** Wells Fargo
3:30pm	**Ask Anyone Anything**	**Open Forum**
4:15pm	**Closing Remarks**	**Todd Nixon**

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