CRAMER ROUNDTABLE SERIES

Annuities

April 10, 2025 | The Westin Nashville

CRAMER & associates

JackCramer.com

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Jack Cramer**
8:20am	**Regulation to Reinvention – The State of the Annuity Industry** - Working With a New Administration - SEC vs. Cutter – Why It Matters - Digital Transformation	**Wayne Chopus –** IRI **Chuck DiVencenzo –** NAFA **Carlie Wagner –** Athene
9:50am	**Annuity Order Entry Systems** - Streamlining Front- and Back-End Efficiency - Eliminating the Advisor Swivel Chair - The Process of Change	**Betsey Grover –** Fidelity Wealthscape **Nelson Lee –** Infras **Joe Mirarchi –** TD Bank
11:10am	**Returns with Innovation, Limits & Adventure** - Guardrails and Guidelines - In the Spotlight and On the Hotseat - RILAtively Irresistible Strategies	**Chris Barr –** Wells Fargo **Brian Mack –** Citi **Pat Manion –** Osaic
12:00pm	**Lunch**	
1:00pm	**One-on-One with Rob Santillo** - Annuity Manufacturing and Distribution - SWOT Analysis	**Rob Santillo –** PNC Investments EVP, Product Management & Research
2:00pm	**Data Presentation**	
2:25pm	**Ask Anyone Anything**	**Open Forum**
3:30pm	**Better Together** - Partner Meetings - Book Reviews - Reducing Friction	**Tim Beczkowski –** D.A. Davidson **Jeff Leiker –** Fifth Third **Heather Shaffer –** Huntington
4:05pm	**Closing Remarks**	**Todd Nixon**

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