

MEETING AGENDA

Sunday, November 4

8:30 am	SPARK Fishing Tournament (optional)
9:00 am	SPARK Golf Tournament (optional)
1:00 – 8:00 pm	Registration – Register upon your arrival or at your convenience. Refreshments will be available.
5:30 – 8:00 pm	Welcome Cocktail Reception and Service Exhibition A showcase of the best new products and services offered to the industry today.

Monday, November 5

7:30 – 8:30 am	Registration	
7:30 – 8:30 am	Continental Breakfast with Exhibitors	
8:30 – 8:45 am	Welcome and Opening Remarks	
8:45 – 9:45 am	Marketplace Update	Bob Wuelfing, <i>RG Wuelfing & Associates</i> Cynthia Hayes, <i>Merrill Lynch Retirement Group</i>
9:45 – 10:15 am	Refreshment Break with Exhibitors	
10:15 – 11:15 pm	Keynote Speech – Fee Disclosure: Transparency or Tragedy?	Ann Combs, <i>The Vanguard Group</i>
11:15 – 12:15 pm	Washington Update: Regulatory and Enforcement Efforts	Tom Schendt, <i>Alston + Bird</i>
12:30 – 1:30 pm	Lunch	
1:30 – 2:30 pm	Record Keeping Systems Trends	Bob Wuelfing, <i>RG Wuelfing & Assoc. (Moderator)</i> Don Mackanos, <i>SunGard Employee Benefit Systems</i> Additional panelist to be announced
2:30 – 3:00 pm	Refreshment Break with Exhibitors	
3:00 – 4:00 pm	BREAKOUT SESSIONS	
	1 Participant Education vs. Advice: The New Paradigm	Liz Michaels, <i>Ibbotson Associates</i> James Nichols, <i>TIAA-CREF</i>
	2 New Distribution Strategies in the Advisor Market	Robert Goldstein, <i>National Retirement Partners</i>
	3 Small Plan Retirement Market: Trends and Opportunities	Louis Fleites, <i>Financial Research Corp.</i>
4:00 – 5:15 pm	Reception with Exhibitors	
6:30 pm	Luau Reception and Dinner Join us for a relaxing, casual Luau by the pool with a magnificent view of the ocean.	

MEETING AGENDA

Tuesday, November 6

8:00 – 8:30 am	Continental Breakfast	
8:30 – 9:45 am	Legislative Update	Steve Saxon, <i>Groom Law Group</i>
9:45 – 10:00 am	Refreshment Break	
10:00 – 11:00 am	The Changing Investment Landscape	Brian Birmingham, <i>Genworth Financial</i> (Moderator) Michael Seidenburg, <i>ADP Retirement Services</i> Chris Cumming, <i>Great-West Retirement Services</i> Sandra McCarthy, <i>CitiStreet</i>
11:00 – 12:00 noon	Fiduciary Issues: A Consultant's Perspective	Robert McAree, <i>Sibson Consulting</i>
12:00 noon	Conference Adjourns	

WHO SHOULD ATTEND?

The 2007 SPARK Forum is an exclusive event for employees of SPARK member companies. The conference presents outstanding educational and networking opportunities for a broad array of company executives, including:

- ▶ Group Retirement Division Executives
- ▶ Investment Advisors and Managers
- ▶ Marketing Managers
- ▶ Trust Officers
- ▶ Record Keeping Administrators
- ▶ Product Development Managers
- ▶ Systems and Operations Heads
- ▶ Communications Directors
- ▶ Client Services Managers
- ▶ Legal and Compliance Officers
- ▶ Government Affairs Representatives