



FINANCIAL
SERVICES
ROUNDTABLE



ebri.org
Employee Benefit
Research Institute



RETIREMENT PLAN PORTABILITY & PUBLIC POLICY: UNLOCKING THE POTENTIAL IN PORTABILITY

Agenda

Explore groundbreaking research from EBRI that demonstrates the potential in portability, what auto portability's role is in unlocking that potential, an inspection of the pending advisory opinion and its implications, and an update on key developments along the path to widespread adoption of auto portability in the retirement market.

Date & Time: March 30, 10:30am-12 noon

Location: Financial Service Roundtable

Attendance: Registration at the FSR Event Link

Hosted by: Financial Services Roundtable, WISER, EBRI, Retirement Clearinghouse

Amenities: Refreshments and box lunches will be provided

Agenda:

Introduction	Sen. Kent Conrad		Co-Chair, Bipartisan Policy Center Commission on Retirement Security and Personal Savings
EBRI Portability Research	Jack VanDerhei	25 min	New EBRI research: The Value of Portability
Auto Portability Explained	Spencer Williams	10 min	Economic impact Mechanics: Bundled/Unbundled, Locate & Match from Plan or SHIRA, Progressive Pricing, Consent Waterfall, Embedded Standards
Auto Portability Advisory Opinion	Steve Saxon	15 min	Consent Waterfall, Negative Consent, Program Notices (Consumer Protections)
Auto Portability Progress Report Part 1	Tom Johnson	10 min	Recordkeeper engagement, Working Group status
Auto Portability Progress Report Part 2	Neal Ringquist	10 min	Plan Sponsor engagement, Auto Portability Beta
Wrap Up: Auto Portability & the Future of Portability	Spencer Williams	5 min	Higher balances, Loan maintenance, State-based programs, etc.
Q&A			