

Minding the Gaps: Helping Move People to Where They Need to Be Conference Agenda at a Glance

CE Credits
Pending



	Conference • July 18–19, 2016	Master RMA® Bootcamp • July 20–22, 2016
SALEM STATE UNIVERSITY, SALEM, MA		

DAY ONE: Monday, July 18 Pre-Conference Activities

10:00 AM–12:00 PM	Pre-Conference RMA® CE Session (RMA® Graduates and RMA® Candidates only) Pre-Conference RMJ® Peer-Reviewers Meeting. Summer RMJ® sponsored by Milliman. Pre-Conference VLC Authors and Presenters Meeting
-------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	Conference Sessions	Speaker(s)
12:00–1:00 PM	Buffet Lunch	Sponsored by: TBA
1:00–1:45 PM	The value of data gathering and integration in a comprehensive framework: How RIIA®'s Procedural Prudence map (PPm) helps customize retirement advisory services to client types above and beyond the six services in Morningstar's "Gamma"?	Moderator: François Gadenne, CFA®, RMA®, Chairman and Executive Director of RIIA Speaker: Kerry Uffman, PFS, CFP®, CFA®, RICP, RMA®
1:45–2:30 PM	Client values before financial goals as a means to assess prior probabilities and to develop prior knowledge: What is the practical impact of assessing qualitative client values before developing quantitative goals-based retirement recommendations?	Moderator: Brad Owen Speaker: TBA
2:30–3:00 PM	Break	Sponsored by: TBA
3:00–3:45 PM	Measuring risk of ruin with retirement risk models: What is the evidence for implicit over-optimism in commonly used risk models?	Moderator: Dirk Cotton Speaker: Huy Lam
3:45–4:30 PM	The "Ring that Rules Them All": How does the field of Thermodynamics frame the constraints and limitations of the retirement Feasibility Condition?	Moderator: Anand Rao Speaker: Tim Garrett
5:00–6:30 PM	Reception and Welcome	Sponsored by: TBA
6:30 PM	RIIA Board Meeting Dinner (by Invitation Only)	Sponsored by: TBA
6:30 PM	Explore downtown Salem – Check conference material for map and restaurant guide	

DAY TWO: Tuesday, July 19

8:00–8:30 AM	Breakfast	Sponsored by: TBA
8:30–9:15 AM	The experience of putting people through the RMA program: How does retirement plan feasibility (risk capacity) and mapping risk exposures in the context of RIIA®'s household balance sheet (HHBS) improve processes based on risk tolerance and sustainability (risk-of-ruin) models?	Moderator: Robert Powell, Editor, Retirement Management Journal (RMJ) Speaker: Mike Lonier, RMA®, The Financial Preserve™ at Lonier Financial Advisory LLC, Sarasota, FL
9:15–10:00 AM	Beyond portfolio volatility risk: How can we extend the concept of Put Option Replication from market risk and portfolios of risky assets to un-systematic, client idiosyncratic risks as defined in the RMA Curriculum, including Health Risks?	Moderator: Ron Mastrogiovanni Speaker: Tamara Burden, Milliman
10:00–10:30 AM	Break	Sponsored by: TBA
10:30–11:15 AM	The many impacts of the Fiduciary Rule(s): How do we experience the limits of product-based planning and the implications of sharing retirement plan information in the interactions between fiduciary planners and product providers?	Moderator: Joan Boros Speaker: Tom Roberts
11:15 AM–12:00 PM	Adopting Best Practices: What are the implications of developing elite programs based on the Procedural Prudence map in general and the Household Balance Sheet View in particular?	Moderator: François Gadenne, CFA®, RMA®, Chairman and Executive Director of RIIA Speakers: Dan Keady, TIAA; Zach Parker
12:00–1:00 PM	Lunch	Sponsored by: TBA
1:00–1:45 PM	Putting it all together: What are the benchmarking best practices for the management and the monitoring of your clients' retirement portfolios?	Moderator: MikeZwecher Speakers: Patrick Collins, Josh Stampfli
1:45–2:30 PM	Conference wrap-up: What have we discovered and validated during this conference and what more should we explore as we prepare for next year's conference?	François Gadenne, CFA®, RMA®, Chairman and Executive Director of RIIA®
2:30 PM	Break and end of conference	Sponsored by: TBA

The Master RMA® program is available to RMA® Graduates who seek to develop a deeper mastery of the retirement planning process. Building on the work performed with the RMA approved courses of study, the Master RMA® boot-camp delivers "how"-to discussions and cases in a face-to-face environment. The Master RMA® students are expected to attend the conference as well as the boot-camp.