



JOIM Conference Series

September 8-10, 2019 / MIT Sloan School of Management

Retirement Investing: The State of the Art Part II

Sunday, September 8th

Samberg Conference Center, Salons M - I , 7th floor

5:30pm Reception / 6:00pm Dinner

7:00pm

Opening Remarks Gifford Fong, JOIM

Keynote Speaker Robert Merton, Massachusetts Institute of Technology

Monday, September 9th

General Sessions Samberg Conference Center, Salons M-I-T, 7th floor

8:00am - 9:00am Breakfast

9:00am Opening Remarks

9:00am - 10:15am **Speaker:** Deborah Lucas, MIT Golub Center for Finance and Policy
Title: How Much Can Collective DC Plans Improve Risk-Sharing?

10:15am - 10:45am Break

10:45am - 12:00pm **Speaker:** Sanjiv Das and Dan Ostrov, Santa Clara University
Title: Goals-Based Wealth Management with Multiple Goals
Discussant: Eric Penanhoat, Penanhoat Consulting

12:00pm - 1:30pm Lunch Talk Zvi Bodie, Bodie Associates
Facts and Fallacies about Investing for Retirement
Kenneth Blay, Invesco

1:30pm - 2:00pm Break

2:00pm - 3:15pm **Speaker:** Arun Muralidhar, Mcube Investment Technologies
Retire In-Home: A New Way to Use a Home to Guarantee
Retirement Income
Title:
Discussant: Martin Landry and Jennifer Hutchins, 1st Global/Blucora

3:15pm - 3:45pm Break

3:45pm - 5:00pm **Speaker:** Hayne Leland, A&P Capital, LLC
Towards Replacing the Defined Benefit Plan: Assured
Retirement Income Provided by a Liquid Investment Fund
Title:
Discussant: Bernard R. Horn, Polaris Capital Management, LLC

5:00pm - 6:00pm **Reception** Samberg Salon East

Tuesday, September 10th

General Sessions Samberg Conference Center, Salons M-I-T, 7th floor

8:00am - 9:00am Breakfast

9:00am - 10:15am **Speaker:** Matthew O'Hara, BlackRock
Title: Inflation and Target Date Funds: Definitive Insights into Inflation-Hedging
Discussant: Shane Shepard, Research Affiliates

10:15am - 10:45am Break

10:45am - 12:00pm **Speaker:** Jonathan Parker, Massachusetts Institute of Technology
Title: Belief Disagreement and Portfolio Choice
Discussant: William Kinlaw, State Street Associates

12:00pm - 1:45pm **Lunch Panel Discussion - "Innovations in Pension Products and Policies"**
Deborah Lucas, MIT Golub Center for Finance and Policy
John O'Brien, A&P Capital, LLC
Robert Pozen, MIT Sloan School of Management