

CIPR Symposium: Boom or Bust? A Look into Retirement Issues Facing Baby Boomers

June 15-16, 2015
Marriott Country Club Plaza
Kansas City, Mo

Agenda: Day 1

12:00 Registration Check-in

1:00 Welcome Address

Commissioner Scott Kipper (NV)
Introduction: Goals and Overview

1:15 Session 1: Embracing the Aging Population Trend

1:15 Demographic Change and its Impact on Social Security—*Jennifer Ortman and Christopher Dick, US Census Bureau*

Topics Covered: Changing Demographic of the Retired Population, Impact of an Aging Population on Social Security

1:45 Strengthening Social Security in a Time of Population Aging— *William J. Arnone, National Academy of Social Insurance (NASI)*

Topics Covered: Social Security Reform

2:15 Living with Chronic Illness— *Bob Rosenblatt, Editor at HelpwithAging.com*

Topics Covered: Current and Future Impact of Chronic Diseases on Families, Federal Programs, and Insurers. Chronic Disease Incident Trends, Leading Causes of Morbidity and Chronic Illness.

2:45 Break (*Refreshments Served*)

3:00 Session 2: Panel Discussion: Long-Term Care Support and Services into Future

Moderator: Bob Rosenblatt, HelpwithAging.com
Panelists: Warren Jones, MAAA, FSA, FCA, Academy State Health Committee, Lee Goldberg, National Academy of Social Insurance (NASI), Beth Ludden, Genworth Financial

Topics Covered: New Approaches, New Alliances

4:30 Adjourn

Day 2

8:00 Breakfast

9:00 Session 3: Panel Discussion on Changes in the Healthcare Market Place

Moderator: Commissioner Kipper

Panelists:

Lee Goldberg, National Academy of Social Insurance (NASI)

Joel Slackman, Blue Cross Blue Shield Association

Joe Altman, FSA, United Healthcare

Imad Ahmed, Optum Health

Topics Covered: healthcare price drivers, access, continuity of care, controlling costs through preventative care, telehealth, and community based services.

Delivery of care changes and the policy options to address them (light state regulation with private insurance, Medicare providing useful models)

10:30 Break (*Refreshments Served*)

10:45 Session 4: Medicare and Medicaid, 50 Years of Change (Interview)

Interviewer: Lee Goldberg, National Academy of Social Insurance (NASI)

Interviewee: Bob Rosenblatt, Editor at HelpwithAging.com

Topics Covered: How demographic, political, medical, technology, and social changes have changed and will continue to change these programs.

11:30 Lunch

12:30 Session 5: The Impact of Longevity on Retirement Needs

Changes in Retirement: Expected and Unexpected—*Anna Rappaport, F.S.A, M.A.A.A (Anna Rappaport Consulting)*

Topics Covered: Longevity Risk Drivers (Including Pension De-Risking and Demographic Changes) and their Implications on Retirement Asset and Healthcare Needs, Pre-Retirement and Post-Retirement Preparedness, Most Common Individual Strategies for Managing the Risk

Day 2 (Cont'd)

1:15 Session 6: Retirement Savings and Income Options

1:15 Planning for Healthcare: How Longevity Impacts Retirement Income Planning—*Frank O'Connor (Insured Retirement Institute—IRI)*

Topics Covered: Understanding How Health Status May Impact Longevity, Medical Expenses, and Income Needs

2:00 Insurance Products and Emerging Issues—*Mark Shemtob, MAAA, ASA, EA, MSPA, American Academy of Actuaries*

Topics Covered: Retirement Savings Products, Filling in the Gaps of Social Security and Pensions, Emerging Issues

2:45 Break (*Refreshments Served*)

3:00 Session 7: Social Security and Retirement Planning

Maximizing Social Security, *William J. Arnone, NASI*

3:45 Closing Remarks and Adjournment