

**DOL/SEC Target Date Fund Public Hearing**  
**Hearing Agenda**  
**June 18, 2009**

9:00 a.m. — Opening Remarks

9:30 a.m. — Panel One: Introduction to Target Date Funds

- ◆ Karrie McMillan, Investment Company Institute
- ◆ Rich Whitney, T. Rowe Price Group, Inc.
- ◆ John Ameriks, Vanguard Group
- ◆ Derek L. Young, Fidelity Management & Research Company
- ◆ Jeffrey Knight, Putnam Investments

10:20 a.m. — Panel Two: Target Date Fund Investor Considerations

- ◆ Rod Bare, Morningstar, Inc.
- ◆ David Certner, AARP
- ◆ Joseph C. Nagengast, Target Date Analytics, LLC
- ◆ Marilyn Capelli Dimitroff, Certified Financial Planner Board of Standards, Inc.

11:05 a.m. — Break

11:20 a.m. — Panel Three: Exploration of Glide Paths and Underlying Investments

- ◆ Edward Moslander, TIAA-CREF
- ◆ Seth J. Masters, AllianceBernstein L.P.
- ◆ Anne Lester, J.P. Morgan Asset Management
- ◆ Michael Case Smith, Avatar Associates
- ◆ Jeffrey S. Coons, Manning & Napier Advisors, Inc.

12:00 p.m. — Panel Four: Plan Sponsor Considerations

- ◆ Ian Kopelman, representing The Profit Sharing/401(k) Council of America
- ◆ Mark Wayne, representing National Association of Independent Retirement Plan Advisors
- ◆ Allison Klausner, representing American Benefits Council
- ◆ Jessica R. Flores, Fiduciary Compliance Center

12:45 p.m. — Lunch

1:30 p.m. — Panel Five: Utilization of Target Date Funds in Defined Contribution Plans

- ◆ Jack VanDerhei, Employee Benefits Research Institute

- ◆ Mark J. Warshawsky, Watson Wyatt Worldwide
- ◆ Jodi DiCenzo, Behavioral Research Associates

2:05 p.m. — Panel Six: Understanding, Selecting, and Monitoring Target Date Funds

- ◆ Josh Cohen, Russell Investments
- ◆ Richard O. Michaud, New Frontier Advisors, LLC
- ◆ Chip Castille, Barclays Global Investors
- ◆ Lori Lucas, Callan Associates Inc.

2:50 p.m. — Break

3:05 p.m. — Panel Seven: Understanding, Selecting, and Monitoring Target Date Funds

- ◆ James P. Lauder, Global Index Advisors, Inc.
- ◆ Claiborne B. Morton III, Raymond James Financial Services
- ◆ Richard C. Dunne, QDIA.com
- ◆ Louis S. Harvey, DALBAR, Inc.

3:50 p.m. — Panel Eight: Disclosures related to Target Date Funds

- ◆ Anne Tuttle, Financial Engines
- ◆ David A. Krasnow, Pension Advisors
- ◆ Randal McGathey, RM Consulting
- ◆ Edward P. Moore, Edelman Financial Services, LLC

4:35 p.m. — Panel Nine: Target Date Funds and Other Investment Options

- ◆ Michael Drew, Griffith Business School
- ◆ Chris Tobe, Breidenbach Capital Consulting, LLC
- ◆ Ross Bremen, NEPC, LLC
- ◆ Mark Foley, Prudential Investment Management Services, LLC

5:20 p.m. — Closing Remarks