



Innovation Forum Agenda

Thursday, March 26, 2026

VEA Hotel | 900 Newport Center Dr., Newport Beach, CA

7:30 - 8:30

Registration & Breakfast

8:30 - 8:35

Welcome Remarks

Nikki Pirrello, DCIIA

8:35 - 8:40

Opening Remarks

Karen Neeley, Pacific Life

8:40 - 8:45

DCIIA Chair and Emcee Remarks

Mike Raso, PineBridge Investments

8:45 - 9:15

The Future of Work

Deniz Lenger, McKinsey

9:15 - 9:25

Optimizing Plan Design: Quantifying Personalization Strategies

Spencer Look, Morningstar

9:25 - 9:55

Leveraging Technology and Customization to Drive Outcomes

Debbie Allan, Commonwealth Savers

Rachel Brumbaugh, Troutwood

Elena Wang, AllianceBernstein

Moderator: Paul Quinlan, Blackstone

9:55 - 10:05

**Workplace Excellence Leader Spotlight: Creating a Culture of
Camaraderie: Leading with Empathy**

Vidur Mehra, PIMCO

10:05 - 10:30

Networking Break

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10:30 - 11:10

Focus on the Participant: Retirement Income Solutions

Michael Finke, The American College

Manish Malhotra, Income Discovery

Dennis McDonald, TIAA

Matthew Olenak, KKR

Katherine Santiago, J.P. Morgan Asset Management

Moderator: Tamiko Toland, 401(k) Annuity Hub

11:10 - 11:25

Reaction / Discussion: Retirement Income Solutions

Michael Esselman, OneDigital

Lisa Joe, PwC

Moderator: Josh Rundle, Ascensus

11:25 - 11:35

Converting AI Adoption into Sustainable Growth

Tom Miedema, Walter Scott

11:35 - 11:45

**Workplace Excellence Rising Star Spotlight
Leading Inclusive Programming and Fostering Connections**

Lora McCoy, Lincoln

11:45 - 11:50

Emcee Remarks

Mike Raso, PineBridge Investments

11:50 - 1:00

Lunch

1:00 - 1:05

Emcee Remarks

Hannah Schriener, Meketa

1:05 - 1:20

Private Assets: Questions for Providers

Laura Pugliese, Virginia Retirement System

Will Stanco, NEPC

Moderator: Michael Keady, Alight

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1:20 - 2:00

**Providers Respond -- Leveraging Coopetition and Comanufacturing:
Innovations in Private Assets, Retirement Income and More**

Christabelle Cook, Principal
Brendan Curran, State Street
Scott Graham, Global Trust Company
Chris Lyon, Goldman Sachs
Mike DeFeo, Apollo
Moderator: Jeremy Stempien, PGIM

2:00 - 2:30

Pacific Life Keynote

2:30 - 2:40

**Workplace Excellence Rising Star Spotlight: Leveraging Data to Improve
Workplace Culture and Financial Outcomes**

Priya Punatar, Fidelity

2:40 - 3:10

Leveraging Data and Technology to Foster Innovation

Bill Harmon, Thrive
Ana Mahony, Addition Wealth
Cassandra Roth, BlackRock
Moderator: Josh Dietch, NMG Consulting

3:10 - 3:35

Networking Break

3:35 - 3:45

Research Spotlight: Future of Retirement

Mike Dullaghan, Franklin Templeton

3:45 - 3:55

Innovations in Cybersecurity

Suzanne Carlson, Accenture

3:55 - 4:25

Driving Participant Engagement: Trends in Customization and AI

Bianca DeStefano, Vanguard
Zhikun Liu, MissionSquare
Jesse Mark, Edelman Financial Engines
Moderator: Christelle Ngnoumen, Voya

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4:25 - 4:55

Plan Sponsor Perspectives: Reflecting Back, Looking Ahead

Dr. Edward Angel, Fluor

Kenneth Hales II, Warner Brothers Discovery

Jessica Hart, Exelon

Moderator: Angelo Auriemma, Mercer

4:55 - 5:00

Closing Remarks

Hannah Schriener, Meketa

5:00 - 6:00

Networking Reception

6:30

Group Dinners