



NEUGROUP FOR DB & DC PLAN MANAGEMENT 2026 H2 MEETING AGENDA

Day One: Wednesday, November 11, 2026 (All times reflect Central Time)

6:30 – 9:30pm

Welcome Reception and Dinner

Kindling Downtown, 202 S Franklin St., Chicago, IL 60606

Join fellow members for cocktails and dinner as we reconnect, welcome new participants, and exchange perspectives on the emerging issues shaping the Office of the CFO. These informal conversations often lay the groundwork for the deeper discussions and collaboration that tomorrow's meeting will bring.

Day Two: Thursday, November 12, 2026 (All times reflect Central Time)

8:30 – 9:00am

Arrivals and Breakfast

Mayer Brown, 71 S Wacker Dr, Chicago, IL 60606

9:00 – 9:30am

Welcome and Introductions

We'll open by welcoming members, recognizing Mayer Brown for hosting and our sponsors Athene and Vitera for their support, and reviewing the objectives and priorities for the meeting.

Session leader:

— Ted Howard, NeuGroup

9:30 – 10:30am

From Deficits to Surpluses: Implications for the Pension Risk Transfer Market in the US and Globally

Athene will provide an overview of the current pension risk transfer (PRT) landscape, including market trends and key considerations for plan sponsors evaluating risk-transfer strategies. The session will also explore opportunities for plan surplus utilization and discuss the evolving role of Outsourced Chief Investment Officer (OCIO) solutions relative to PRT approaches, followed by a roundtable discussion for members to share their perspectives and experiences.

Session leaders:

- Katie Daly, Executive Vice President, Global Head of M&A, Reinsurance, and Pensions, Athene
- Kelly Kearns, VP Pension Risk Transfer, Athene
- Richard McEvoy, Pension Risk Transfer Leader, Athene

10:30 – 12:00pm

Projects & Priorities

Members will begin by sharing an update on the progress made since the H1 meeting, including key wins, lessons learned and any new challenges or blockers that have emerged. They will then articulate one key outcome they hope to achieve from this meeting and the second half cycle.

Session leader:

- Ted Howard, NeuGroup

12:00 – 1:00pm

Lunch and Networking

Enjoy lunch with fellow members while continuing the conversations sparked during the meeting. This informal setting provides an opportunity to exchange ideas, strengthen relationships, and connect with peers facing similar opportunities and challenges.

1:00 – 1:45pm

After Lunch Walk and Talk

Step outside for a guided networking walk designed to encourage one-on-one conversations in a more relaxed setting.

1:45 – 2:00pm

Recombobulate

2:00 – 2:45pm

The Future of Retirement Benefits: Are DB and DC Converging?

After decades of shifting retirement responsibility to employees, is the pendulum swinging back? As DC plans add retirement income, institutional investments and more managed solutions, members will discuss whether DB and DC are beginning to converge—and what that could mean for retirement benefits by 2030.

2:45 – 3:45pm

Retirement Income: Accumulation to Decumulation

Vitera, an affiliate of Apollo, will provide an overview of the evolving guaranteed lifetime income landscape, including innovations in defined contribution plans and key considerations for plan sponsors evaluating implementation strategies. The session will also explore approaches for improving retirement income outcomes for participants and discuss the evolving role of guaranteed income solutions relative to traditional decumulation strategies, followed by a roundtable discussion for members to share their perspectives and experiences.

Session leaders:

- Rebecca Tadikonda, Partner, Apollo and CEO, Vitera, an affiliate of Apollo
- Ashwini Apte, Managing Director and Head of Defined Contribution, Apollo
- Elina Steinberg, Head of Client Portfolio Management & Marketing, Vitera, an affiliate of Apollo

3:45 – 4:00pm

Break

Take some time to exchange ideas, compare approaches, and continue conversations that can help move your priorities forward.

4:00 – 4:45pm

DC Plan Investment Lineup

Members will discuss changes to 401(k) investment menus, target date fund suitability and evaluation, and new investment options (e.g., commodities, digital asset funds).



4:45 – 5:15pm

AI Workbench Powered by NGTT

In this rapid-fire session, members share new and updated AI use cases they have implemented or explored since the group's last meeting, including successes, lessons learned and practical challenges. The group validates, refines and expands these examples, contributing them to NeuGroup's AI Workbench, powered by NeuGroup for Technology Transformation.

Session leader:

— Ted Howard, NeuGroup

5:15 – 5:30pm

Closing Remarks

We'll conclude by reflecting on the meeting's key themes, reinforcing the commitments and next steps identified over the course of the day, and previewing opportunities to drive momentum between meetings through NeuGroup Connect, Execution Sprints, and virtual sessions.

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