

PARTICIPANT STRATEGY ROUNDTABLE

2014 ANNUAL MEETING

The Pursuit of Happiness in Retirement:
Spotlight on Cheapskate Culture

November 12/13, 2014 • Phoenix, Arizona • Hosted by: Wells Fargo Bank



Meet Jeff Yeager, "The Ultimate Cheapskate"

[Register Now](#)

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Meet Ultimate Cheapskate Jeff Yeager

The rise of Cheapskate culture is one unmistakable benefit of the global financial crisis of 2008 for the industry. Necessity drove millions of Americans to make it a core belief that “cheap is good”. The hunt for bargain-basement prices spurred the growth of distribution alternatives Craigslist, the Goodwill store, and Aldi’s, impacting business across product categories. The cultural trend is epitomized by TLC television show *Extreme Cheapskate* that first aired in December 2011. Perhaps in reaction to the conspicuous consumption of their baby boomer parents, millennials focus on the simpler pleasures in life, redefining the meaning of happiness. The trend impacts participant retirement readiness favorably as more participants adopt penny-pinching habits that allow them to save 10 to 15% of earnings toward retirement. What can Retirement Plan Service providers do to ride the wave, to spread Cheapskate culture from its core believers, and to make the phenomenon a lasting trend? Meet Jeff Yeager, author of *How to Retire The Cheapskate Way*, for an address punctuated with original, plentiful, and age-appropriate humor.

Meeting Objective

Forum for heads of participant communication and counseling teams to discuss current developments and emerging issues impacting retirement readiness.

- Drive participation, contribution level, and asset allocation through plan design, participant communication, and counseling
- Reduce erosion from loans and premature distribution
- Encourage asset accumulation, account consolidation, and responsible lifetime income distribution
- Enhance the effectiveness of the national retirement system

Who Attends

Attendance is by invitation. The invitation is extended to heads of participant strategy, participant communication, counseling, education, contact center and Website at retirement plan service providers

- Across distribution channels (direct, consultant, brokerage, TPA, bank, and others)
- Mid-sized, large and jumbo plans
- Corporate, government, not-for-profit, higher-education and Taft-Hartley markets
- TRO, integrated benefits, defined contribution plans, defined benefit plans, and NQDC plans

Date, Time, Venue, Dress Code

November 13, 2014 - 8:30 AM to 3:30 PM.
Breakfast starting at 8:00 AM.
Business casual dress code.

Wells Fargo Bank
100 West Washington Street
Phoenix, AZ 85003



Meeting Highlights

Communication / E-media

- E-media production (Webinars/podcasts, video, interactivity, personalization)
- Social Media
- Mobile technology—apps and devices
- Leveraging contractors and agencies
- Copy-writing, design, and project management
- Retirement Readiness / financial fitness

- Advisor and Client Relationship Manager support

Marketing and Counseling Team Management

- Staffing and recruiting
- Compensation and motivation
- Organization / alignment
- Goals, metrics, case load, span of controls
- Skill set development

Counseling / Education

- Retirement income and guarantees
- Traditional environment
- Automatic enrollment environment

Agenda

8:00 AM	Continental breakfast buffet	12:00 PM	Lunch
8:30 AM	Introductions	1:00 PM	Roundtable discussions: Marketing and Counseling Team Management
9:00 AM	Roundtable discussions: Communication/ E-media	2:00 PM	Finding Wholesale Happiness in a Retail World: address by Jeff Yeager, “The Ultimate Cheapskate”
10:45 AM	Break	3:15 PM	Wrap-up and next steps
11:00 AM	Roundtable discussions: Counseling / Education	3:30 PM	Meeting adjourns

Pre-event Networking Dinner

Dinner included in the registration.
Wednesday, November 12, 2014 at 7:30 p.m.



[Blue Hound Kitchen & Cocktails](#)

2 East Jefferson Street
Phoenix, AZ 85004
602-258-0231

“A contemporary American gastro-lounge that raises the bar for all things Phoenix. What separates Blue Hound from the rest of the pack is the artful pairing of seasonal food with handcrafted cocktails-in a comfortable urban setting.”
Visit Phoenix

Hotel / Transportation

For accommodations we recommend the Renaissance Phoenix Downtown Hotel located within walking distance from the meeting site. Please contact the hotel directly by October 28, 2014 and mention that you are part of the EACH Enterprise Phoenix Room Block rate which is \$199 not including taxes/incidentals.

[Renaissance Phoenix Downtown Hotel](#)

50 East Adams Street
Phoenix, AZ 85004
(800) 468-3571 or (602) 333-0000



For those flying into the Phoenix Sky Harbor International Airport—PHX the car ride is approximately 7 miles to the hotel. Transportation options: Light Rail (just outside hotel’s front door), taxi service, bus service or rental car.

Register

Register on-line at: www.regonline.com/PSRT112014

Registration requires an invitation code. Payments by Credit Card, Debit Card, Check or Bank Transfer.

Registration deadlines:

On or before August 31, 2014
After August 31, 2014

Cost Per Attendee

\$825
\$975



Cancellation policy:

EACH Enterprise, LLC will refund your entire meeting fee if you cancel on or before August 31, 2014. For cancellations between September 1, 2014 and October 31, 2014, EACH Enterprise will refund your registration fee minus an administrative fee of \$175. No refunds for cancellations after October 31, 2014.