Communications and Education Committee Update

Marijn Smit, Transamerica, Chair, SVIA Communications and Education Committee
October 13, 2014



Committee Membership

Media Team	Stable Times Editorial Board		
Chair: Marijn Smit, Transamerica			
Ed Adams, IBM Retirement Funds	Ed Adams, IBM Retirement Funds		
Robin Andrus, Prudential Financial	Robin Andrus, Prudential Financial		
Tony Camp, Voya Financial	Phil Connor, MassMutual Financial Group		
Terry Finan, Jackson National Life	Susan Graef, The Vanguard Group		
Brett Gorman, PIMCO	James King, Prudential Financial		
Susan Graef, The Vanguard Group	Gina Mitchell, Stable Value Investment Association		
James King, Prudential Financial	Tim Murphy, New York Life Investment Management		
Steve LeLaurin, Invesco Advisers, Inc.	Jane Marie Petty, Galliard Capital Management Inc.		
Gina Mitchell, Stable Value Investment Association	Aziz Syed, John Hancock Investments		
Jane Marie Petty, Galliard Capital Management Inc.	Greg Wilensky, AllianceBernstein Management		

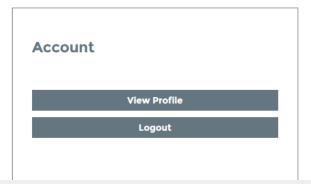


- Upgraded hardware for faster performance
- New member landing page
 - Quickly access key association data
 - Government relations
 - Industry data
 - Stable Times
 - Presentations
 - SVIA organizational documents
 - Member directory

Members

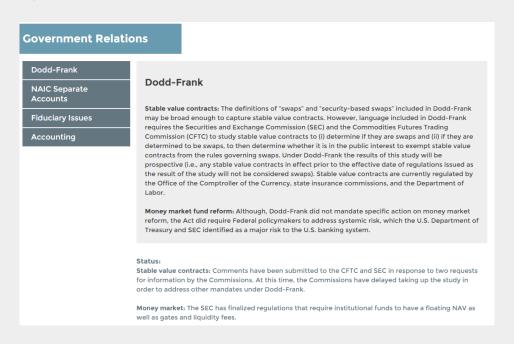
Government Relations	Industry Data	Stable Times	Presentations	SVIA Organization
	View Ali	View All	View All	
Dodd-Frank				Board Roster
NAIC Separate Accounts	First and Second Quarter of 2014	Stable Times Volume 18 Issue 1	Spring Seminar 2014	Committees
Fiduciary Issues	Stable Value Sales and Assets		Presentations	Bylaws
Accounting	Survey	Making Retirement Income Security Work	Stable Value: What's on the	Code of Conduct
	SVIA Stable Value Funds	The 2014 Elections and What	Horizon?	Antitrust Policy
	Quarterly Characteristics Survey for 2Q2014	Will They Mean	Fall Forum 2013 Presentations	Whistleblower Policy
	SVIA Investment & Policy Survey for 2013	A Predictable Surprise: The Unraveling of the U.S.	US Economic Outlook	Document Retention Policy

Directory Search		
Name:		
City:		
Company:		
State:		





- New government relations page
 - Aggregates all government relations topics in one place
 - Provides background on the issue as well as current status
 - Lists association actions and relevant information in reversechronological order





- New industry statistics page
 - Provides all SVIA survey data in excel format with suggested citations:
 - Current Annual Survey
 - Quarterly Survey
 - Compiled Annual Survey data
 - Babbel and Herce Stable Value Study (2011)
 - Stable Value Historic Data Survey
 - Monthly Stable Value/Money Market/Bond Comparison
 - Includes or links to relevant non-SVIA data
 - ICI U.S. Retirement Market data
 - Aon Hewitt 401(k) Index
 - EBRI 401(k) Plan Asset Allocation data



Social Media Initiatives

- Member Visibility Opportunities
 - Opportunity for visibility
 - Assist SVIA in providing information on the asset class
- Broader Focus
 - Expanded key messages
 - Appeal to a wider audience
 - Tie back to stable value

SVIA News

- Member Releases
 - Money Market Fund Rule Amendments: Implications and Options - Prudential
 - Designing Balanced DC Menus: Considering Capital Preservation Strategies - PIMCO
 - 4 Reasons to Include Stable Value in Your 401(K) Portfolio - SVIA
 - Stable Value Webinar Hosted by P&I
 - Designing Balanced DC Menus: Considering Diversified Fixed Income Choices - PIMCO
 - Rising Rates and Stable Value Galliard
 - 14th Annual Transamerica Retirement Survey
 - How America Saves 2013 Vanguard
 - Assessing Stable Value After 2008 Prudential
 - Negotiating Risk for Stable Value Options Dwight
 - MetLife's 2013 Stable Value Study



News

- 2014 Coverage in Publications
 - Stable Value The Safe Investment Choice in Your 401k
 Plan About.com
 - Stable Value vs. Fixed Income: There is a Difference Morgan Stanley Plan Perspectives
 - How To Optimize Your Retirement Accounts: A Case Study – Forbes
 - Favorite Investments for Short-Term Retirement Assets Morningstar
 - Bond Fund Alternatives Can Help Protect You From Rising Rates Forbes
 - Stable Value Funds Demystified: Why a Book Value Guarantee Matters – Schneider Downs
 - How to protect your retirement savings from rising interest rates –
 CBS News MoneyWatch
 - Bond Q&A: stable-value funds; short-term value drops SFGate



Stable Times

Volume 18 Issue 1 (first half 2014)

Provides a number of informative articles on stable value funds

Making Retirement Income Security Work

By Randy Myers

The 2014 Elections and What Will They Mean

By Randy Myers

A Predictable Surprise: The Unraveling of the U.S. Retirement System

By Randy Myers

Outlook and Trends in Defined Contribution Plans

By Randy Myers

The Quest to Expand the Use—and Value—of Defined Contribution Plans

By Randy Myers

Stable Value and Target-Date Funds: Experience and Opportunity

By Randy Myers

Expanding Stable Value's Reach

By Randy Myers

New Wrap Capacity Offers More Opportunity for Growth ... and Competition

By Randy Myers

Stable Value Managers See More Flexibility on Investment Guidelines

By Randy Myers



Stable Value Masterclass

- May 2014 on Asset TV
 - Featuring Jim King, Prudential Financial, Karl Tourville, Galliard Capital Management, and Warren Howe, MetLife
 - Available on stablevalue.org
- Key takeaways
 - Age appropriate use
 - Increases equity opportunities by reducing overall volatility
 - Protection plus returns
 - Built for changing rates
 - Time tested



Upcoming Projects

- Conference videos of stable value experts
 - Over 20 topics being discussed by SVIA members
 - Released throughout the year

Highlight videos of conference sessions

Sustained promotion of stable value