

Communications and Education Committee Update

Marijn Smit, Transamerica Stable Value Solutions, Chair, SVIA Communications and Education Committee

April 27, 2014



Committee Membership

Media Team

Stable Times Editorial Board

Chair: Marijn Smit, Transamerica Stable Value Solutions

Ed Adams, IBM Retirement Funds

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Robin Andrus, Prudential Financial

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Tony Camp, ING

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 Financial Services

Jane Marie Petty, Galliard Capital Management Inc.

Greg Wilensky, AllianceBernstein Management

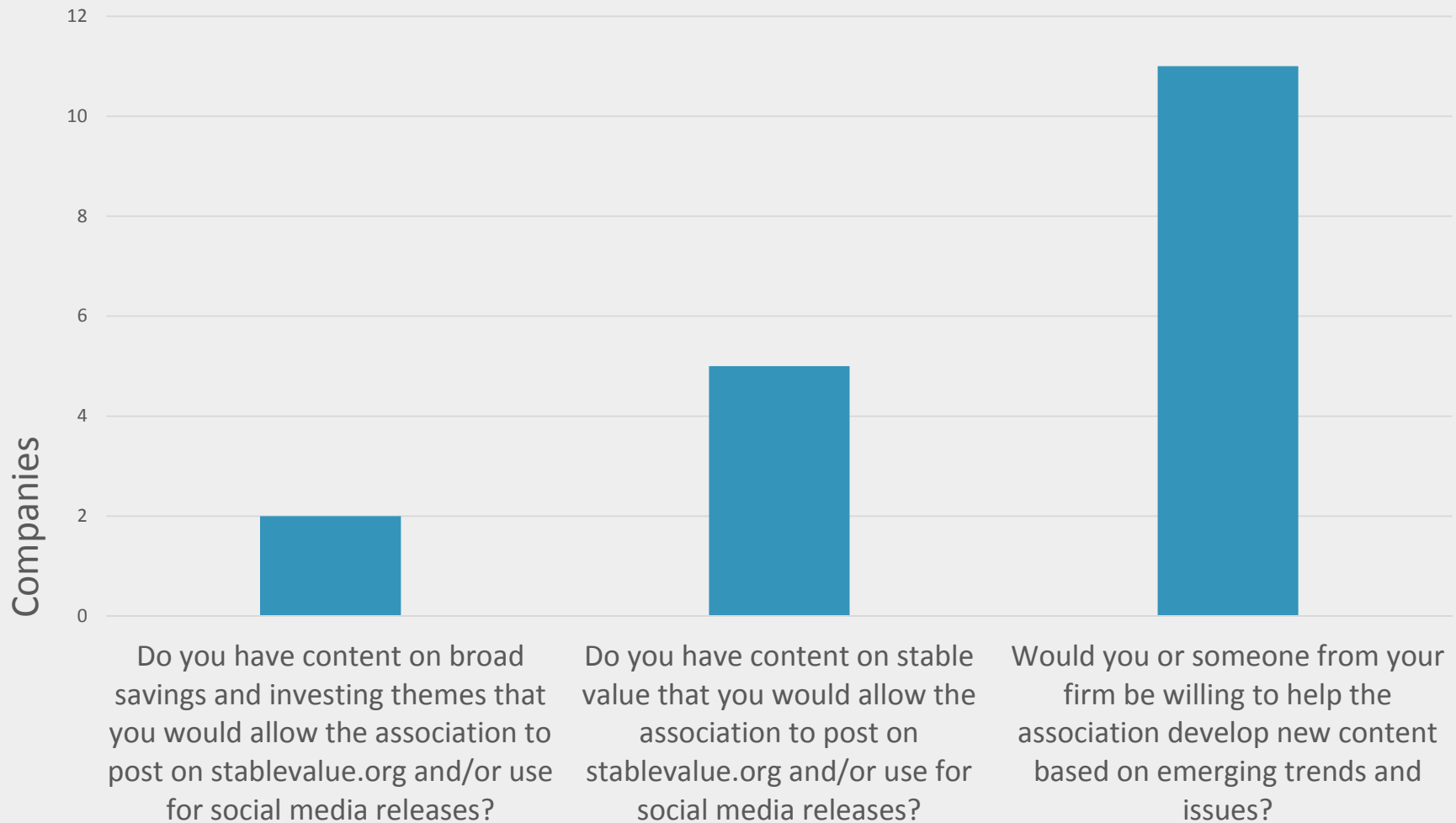


SVIA Webinar: February 12, 2014

How SVIA Can Help You Deliver Your Stable Value Message to Key Constituents

- Social Media Initiatives
 - Messages
 - Approach
 - Content
 - Key Constituents
 - Platforms
- Member Involvement
- Archived on stablevalue.org/news/svia-webinar

Member Participation Survey



Social Media Initiatives

- Member Visibility Opportunities
 - SVIA will soon begin sourcing content from member companies
 - Excellent opportunity for visibility
 - Assist SVIA in providing information on the asset class
- Broader Focus
 - Expanded key messages
 - Appeal to a wider audience
 - Relate back to stable value

Social Media Key Messages

- Participants
 - Good choice for conservative investors
 - Excellent tool for diversified portfolio
 - Historic Precedent
- Plan Sponsors, Advisors, and Consultants
 - How stable value reacts to stresses
 - Benefits not available through other options
 - Demonstrated higher returns than other conservative investment options
 - Historic Precedent

SVIA Perspectives

- Newsletter to update SVIA members on defined contribution plan trends and information
- Past topics
 - Stable value and Dodd-Frank: Are we there yet?
 - Stable value in litigation
 - NAGDCA issues best practice guide that discusses stable value
 - Abbott-Lockheed Martin continues to garner analysis
 - ICI reports total retirement assets grew from 4Q2012 to 1Q2013
 - Money Market Funds: Floating NAV DOA?
 - Fiduciary Reforms Hit a Wall of Opposition
 - Taxpayers and Free Riders
 - Abbott vs. Lockheed Martin
 - Interest Rates: Opportunities and Challenges for Stable Value
 - 401(k) Fees Remain a Hot Topic

Stable Times

Volume 17 Issue 2 (second half 2013)

Provides a number of informative articles on stable value funds

Transforming Tomorrow: Awakening the Super Saver

- By Randy Myers

Dodd Describes His Work on Signature Bill as Once-in-a- Lifetime Opportunity

- By Randy Myers

Stable Value Seen Outperforming Other Fixed- Income Sectors in Rising Rate Environment

- By Randy Myers

Stable Value: Challenges and Opportunities

- By Randy Myers

The Big Picture: Trends in Defined Contribution Plans

- By Randy Myers

Shields Says Income Inequality Could Be “Sleeper Issue” of 2016 Election

- By Randy Myers

Evaluating Fiduciary Risks

By Randy Myers

Stable Value Roundtable

- By Randy Myers

Building an Optimal Investment Lineup for a Defined Contribution Plan

- By Randy Myers

Columnist Sees “Crescendo of Errors” in Washington

- By Randy Myers

Potential Regulatory Changes Cloud Outlook at Front End of Yield Curve

- By Randy Myers

Wells Fargo Economist Sees US Consumer Spending in Seventh Inning of Rebound

- By Randy Myers

How United Technologies Revamped its 401(k) Plan

- By Randy Myers

Paradigm Shift: Changing Demographics Bode Well for Stable Value

- By Randy Myers

Survey Offers Clues to Broader Adoption of Stable Value Funds

- By Randy Myers

Survey Shows Consistent Allocation to Stable Value Over 20 Quarters

- By Gina Mitchell

SVIA News

- SVIA Releases (Website & Press Release)
 - Stable Value Synthetic Investment Contract Basics
 - Stable Value Glossary
 - Guaranteed Insurance Account FAQ
- Member Releases
 - **Behavioral effects and indexing for participants - Vanguard**
 - 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

- Publications

- [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
- [5 money-saving New Year's resolutions](#) – Bankrate
- [Reviewing your 401K ahead of retirement](#) – NBC
- [Protect your 401\(k\) from rising rates](#) – CBS News MoneyWatch
- [Stable Value Bond Funds Provide Smooth Sailing](#) – The Street
- [Plan execs, managers stick with stable value](#) – Pensions & Investments
- [Time to Buy Stable Value Funds?](#) – Barron's
- [Stable value funds preserve capital while boosting return](#) – Chicago Tribune