



STRATEGIC ASSET ALLIANCE
THE INSURANCE INVESTMENT SPECIALIST

Thought Leadership Roundtable

Agenda

“Successful Asset Allocation Strategies within an ERM Framework”

September 16 and September 23, 2008

9:00 am ***“Rating Agency Perspective of ERM”***

Chicago: Stefan Holzberger, Assistant Vice President, AM Best

Stamford: Edward Easop, Executive Vice President, AM Best

- What are rating companies expecting? How will your company measure up?

10:15 am ***“Improved Asset Allocation Strategies Using ERM Tools,”***

Alton Cogert, President and CEO, Strategic Asset Alliance

- SAA’s “Risk Management and Asset Allocation” Survey (June-August 2008) results revealed.
- Learn about powerful technologies available today to assist insurance companies in establishing a qualitative framework for the testing and construction of strategic asset allocation scenarios in support of company operations.

11:45 am **Luncheon Speaker:**

“Insurer Experience Implementing and Utilizing ERM/ALM/DFA”

Chicago: Anna Rodriguez, Vice President Investments, SCF Arizona

Stamford: Mark Abbott, Managing Director Quantitative Risk Management, Guardian Life Insurance

- Your experience will conclude with a ***complimentary lunch*** highlighting a guest speaker relating a “real world” insurer experience: How did they approach the problem? What were the results?

Come early. Breakfast will be served between 8:00 am and 9:00 am.