



Quarterly Industry Insights: Insurance Industry (Webinar Recording)

Topics covered include:

- Current economic trends and issues impacting retirement plans and institutional asset pools;
- Strategies to enhance benefits for key executives and other employees;
- Peer perspectives for industry challenges and overall goals for 2024.

Whether or not your organization currently has a retirement plan advisor, this roundtable discussion provides an executive summary of the top issues a plan sponsor should be considering, plus an in-depth comparison of what other companies in the insurance industry are doing for their retirement programs and strategies.

What You'll Learn in the Discussion

Senior Marketing Director Greg Middleton moderates a data-driven conversation with investment strategist Sam Kirby and senior advisors Jeff Lowing, Paul Owen, and Andrew Shim. Drawing on quarterly reviews with nearly 100 insurance-industry retirement plans representing \$34 billion in assets, the panel distills three core themes every retirement-plan sponsor should have on the radar.

1. Market & Economic Backdrop

U.S. large-cap equities notched double-digit gains in Q1, powered by AI-led mega-caps, while interest-rate-sensitive assets such as real estate and core bonds lagged. The team unpacks why this rally differs from the 1999–2000 tech boom—today's "Magnificent Seven" are delivering real earnings growth—and explains how a higher-for-longer rate environment is reshaping fixed-income strategy for insurers.

2. Implications for Insurance-Company Plans

With meaningful yield back on the table, life and P&C carriers are repositioning surplus portfolios and liability-driven investment (LDI) programs. Higher rates have boosted pension funded status and opened a competitive window for annuity sales, giving sponsors strategic choices on glide-path design, credit exposure, and long-duration hedging.

3. Emerging Priorities for 2024

The panel highlights hot-button items surfacing in committee rooms: integrating guaranteed lifetime-income options inside 401(k)s, weighing Roth in-plan conversions ahead of potential tax-code changes, and taking advantage of SECURE 2.0 provisions such as student-loan matching. They also explore practical AI use-cases—from claims automation to hyper-targeted participant communications—that could boost efficiency and engagement across the enterprise.

Why It Matters

Whether your organization already works with an advisor or is evaluating new partners, this roundtable pairs peer benchmarking with forward-looking insights. You'll walk away with actionable takeaways on balancing risk and yield, preparing for a volatile election-year economy, and designing benefit programs that help both veteran executives and next-generation talent retire with confidence.

Additional Resource:

- [Webinar Presentation Slides](#)

To download a copy of the transcript, [click here.](#)

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