

## **DCIIA & SPARK Institute Frequently Asked Questions**

### **Why are DCIIA and SPARK partnering?**

Our goal in forming this partnership is to help our members more efficiently allocate time and resources to shared initiatives that promote the U.S. retirement system and improve savings and retirement security for America's workers. Beyond this meaningful collaboration, both organizations will maintain our separate focus on our core missions.

### **What is the DCIIA Retirement Research Center (RRC) and why is SPARK doing its research via the RRC?**

DCIIA's RRC:

- Conducts market-informed, policy-relevant research;
- Conducts policy-conscious product research intended to identify trends in product development; and
- Studies broader systematic policy issues with the goal of driving better retirement security outcomes.

As one of the founding members of the DCIIA RRC, SPARK will utilize its capabilities to conduct primary research on recordkeeping issues. As a result, SPARK believes it will save research costs and both organizations see the collaboration leading to significant expansion in our collective research capabilities. With the combined efforts of SPARK and DCIIA, the RRC should be uniquely positioned to execute on market-informed, policy-relevant research that will make a meaningful impact on our industry and on the retirement security of America's workers. For information on how to get involved with DCIIA's RRC contact [info@dciia.org](mailto:info@dciia.org).

### **Why are DCIIA and SPARK partnering on industry technology initiatives? How can I find out if my firm is involved and if not involved, how do we get involved?**

DCIIA and SPARK are jointly coordinating this effort with our member firms to deal with inefficiencies in the current system and to develop cost-effective, practical technology solutions that will allow the industry to better serve American savers. You can contact [info@dciia.org](mailto:info@dciia.org) or [Tim@Sparkinstitute.org](mailto:Tim@Sparkinstitute.org) to determine if your firm is involved and, if not, learn how to join these efforts.

### **My firm is a DCIIA member but not a SPARK member. How will this partnership impact me?**

With the SPARK partnership, your membership experience with DCIIA will be enhanced. You will be on the forefront of public policy discussions, industry research and technology solutions that will drive the industry going forward, as we continue to focus on our mission of improving the financial security of America's workers.

Your firm's number of registrations for the April Public Policy Forum, which is included in your membership dues, remains unchanged. This Forum will retain its focus on U.S. retirement policy issues. You will also be able to register for a new event to be held in June, the Global Public Policy Conference. This new event will focus on the growing interest in defined contribution and personal savings by policy makers around the world. With SPARK leading this event, DCIIA members will be allowed to take advantage of a greatly reduced registration fee and pay only \$950 to attend.

### **My firm is a SPARK member but not a DCIIA member. How will this partnership impact me?**

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With the DCIIA partnership, your membership experience with SPARK will be enhanced. You will be on the forefront of public policy discussions, industry research and technology solutions that will drive the industry going forward, initiatives that are important to our member firms as we continue to promote legislative and regulatory actions that improve the overall retirement system.

You will have access to both the domestic Public Policy Forum being held in April and the Global Public Policy Conference being held in June. SPARK members who are not DCIIA members will pay \$950 to attend the April Forum, which is being led by DCIIA. SPARK members will pay their usual registration fee for the June event, which SPARK is leading.

### **Why are DCIIA and SPARK partnering on separate domestic and global public policy events?**

A vital mission of both DCIIA and SPARK is to promote industry engagement through conferences, forums and other events. These events provide important opportunities for members of both organizations to meet, network, hear from subject matter experts and discuss critical issues impacting retirement security and the retirement savings industry. While each organization's events include a focus unique to its own members and mission, there are certain events, such as those with a public policy focus, that cover overlapping topics. Here DCIIA and SPARK often cover the same themes, trends and legislative and regulatory changes affecting the retirement industry. With so many of the same organizations attending both DCIIA's and SPARK's public policy events, this is a natural place for us to partner and help members better rationalize their conference attendance.

### **Do my membership dues change?**

No, you will continue to pay the same membership fees. If you are only a DCIIA member then you will pay your DCIIA dues. If you are a SPARK member you will pay your SPARK dues. If you are a member of both organizations, you will pay both.

### **If my firm is a member of both DCIIA and SPARK will our dues be reduced?**

No, each organization remains separate entities with different missions and focus. However, this partnership will enhance both organizations by combining resources to meet common goals.

### **I am a plan sponsor and attend DCIIA events. What does the DCIIA/SPARK partnership mean to me?**

As a plan sponsor, you provide a critical voice in shaping our work in the three key areas -- research, technology and events -- that this partnership is focused on. You and your participants will often be the consumers of the outcome of our efforts and those of our members. Therefore, the partnership can only be a success if you have a strong voice at the table, and we welcome your participation in all aspects of our collaboration. We also encourage you to get involved in DCIIA's Plan Sponsor Steering Committee, which will help guide our efforts. Find out more details by contacting [info@dciia.org](mailto:info@dciia.org).

### **What are the dates and locations of each of the Public Policy events?**

Both events will be held in Washington DC. The domestic Public Policy Forum is on April 29 & 30, 2020 and the Global Public Policy Conference is on June 23 & 24, 2020.

### **How do I sign up for these events?**

The link to the Global Public Policy Forum registration is <https://www.sparkinstitute.org/event-list/committee-calendar/#.event/2020/6/23/spark-national-2020>



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The link to the U.S. Domestic Policy registrations is (DCIAA Insert)



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