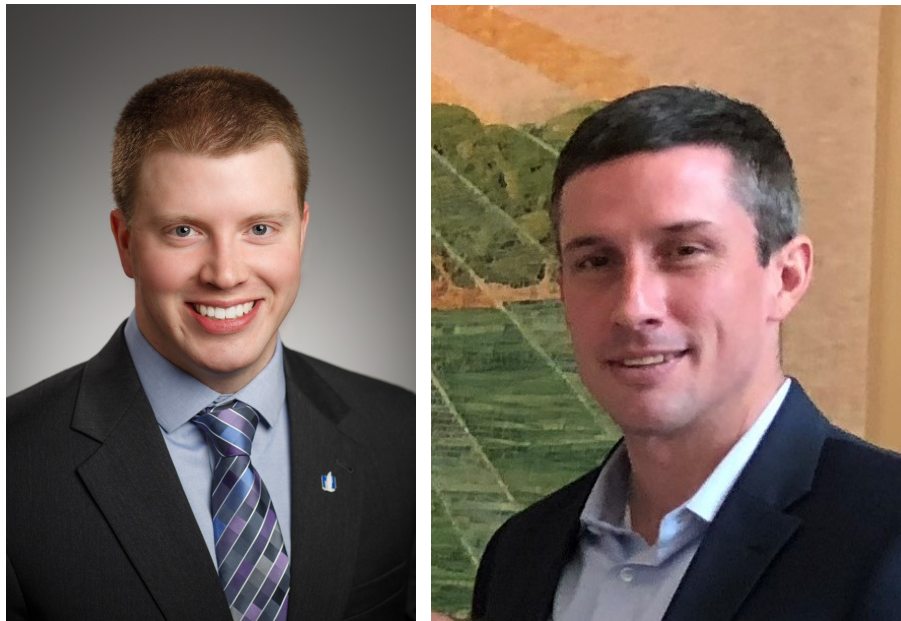


## **In-Plan Guarantees and SECURE Act Guidance**



**Kyle Burley, Nationwide Retirement Solutions & Mike Cicotello, Annexus Retirement Solutions**

The presentation will cover the need from participants and plan sponsors in the income guaranteed space, followed by a breakdown of important provisions of the SECURE Act. Additionally, past product designs that did not work will be discussed as well as how products are being designed now and for the future that address the needs of participants/plan sponsors and overcome the short comings of the past.

### **Kyle Burley**

Kyle Burley is a consultant with the Nationwide Retirement Solutions Sales Enablement team. Kyle specializes in Nationwide's suite of In Plan Guarantee products working with

sales teams to equip them with the knowledge, tools, and experience to have meaningful conversation with our customers.

Kyle began his work at Nationwide in 2009 and has held various sales and service positions in the annuities, employee benefits, emerging markets and government retirement plans teams. In 2016 Kyle moved to California to service Nationwide's book of county and city retirement plans in Northern California. In 2018 he lead Nationwide's efforts to sell employee benefit products on the West Coast.

Kyle graduated from The Ohio State University with a degree in History. In 2020 Kyle completed his Masters of Science in Management from The American College of Financial Services. He also holds the ChFC and CLU designations. When not at the office, you can find Kyle fishing, backpacking, or cycling with his wife and energetic border collie.

### **Mike Cicotello**

With over 17 years of financial services industry experience, Mike brings passion, energy, and an impressive record of expanding sales distribution and revenue growth to his position as senior regional consultant at Annexus Retirement Solutions. A member of the Annexus 401(k) Committee, Mike previously served as an assistant vice president at Transamerica where he was responsible for growing the distribution of mutual funds.