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## **The Bucket**

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By Editorial Staff    *Wed, May 25, 2011*

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*Brief or late-breaking items from DST, Lincoln Financial, Symetra and Prudential.*

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### **Symetra names vice president of Capital Markets Pricing**

Symetra Life Insurance Company has appointed Brent Martonik to the newly created role of vice president and director of Capital Markets Pricing in the company's Retirement Division, reporting to Dan Guilbert, executive vice president of the division.

Martonik will develop investment and hedging strategies in support of new and existing annuity products. He also will have asset-liability management responsibility for the Bellevue, Washington-based insurer's retirement product portfolio, which includes deferred and income annuities.

Martonik joins Symetra from Surema, Inc., a Seattle-based risk management consulting firm he co-founded in 2004. At Surema, he was responsible for business development, general management and execution. That included assessing the market exposure of clients' product offerings, creating product pricing and hedge management solutions, and developing policies and procedures for derivative operations.

Before Surema, Martonik spent 18 years at Safeco Corporation. From 1999-2004, he was vice president and senior derivative portfolio manager, responsible for trading equity and interest rate derivatives. He previously served as assistant actuary at Safeco Life Insurance Company, directing asset-liability management and new product pricing.

Martonik earned a bachelor of science degree in mathematics from the University of Washington. He is a Fellow of the Society of Actuaries and a member of the American Academy of Actuaries.

### **LPL names David Reich to lead retirement platform development**

LPL Financial has appointed David Reich executive vice president of retirement platform development. He succeeds Bob Francis, who was executive vice president, retirement strategy, before leaving the company last January.

Reich will continue to expand the firm's retirement platform, introducing new services and technology and furthering the integration of technology platforms used by LPL Financial advisors to support their retirement plan business.

Along with Bill Chetney, executive vice president of LPL Financial Retirement Partners, Reich will report to Derek Bruton, managing director and national sales manager, Independent Advisor Services.

Reich most recently served at Ameriprise Financial as vice president and general manager, retirement strategies and solutions. He was responsible for strategic development and marketing of all retirement products and platforms to financial advisors. Prior to that, he served in a number of senior leadership roles across Ameriprise and American Express, its former parent.

### **Lincoln Financial launches “InStep” participant-ed program**

Lincoln Financial Group has introduced the *Lincoln InStep* participant education program, which includes content, products, services and multimedia that can help employees take key steps in the savings process.

Four steps in the program include:

- **Getting Started** - Learn the basics of retirement planning and investing through information designed to help people saving for retirement.
- **Saving More** - Identify new ways to boost retirement savings by helping people understand the small steps they can take to help them make the most of their retirement plan and achieve their retirement goals.
- **Investing Wisely** - Optimize asset allocation to fit individual risk profiles and the market environment.
- **Stepping Into Retirement** - Explore retirement strategies and income options.

The four steps are intended to help participants manage retirement planning and financial needs through such life phases as career moves, marriage, parenthood, and home ownership, among others. The program includes in-person online and/or print resources.

### **Prudential launches new ad campaign: “Bring Your Challenges”**

Prudential’s latest U.S. advertising campaign, launched May 24, “invites individuals, financial professionals and institutions to bring their biggest financial challenges to Prudential and highlights the company’s 135-year history of meeting those challenges for Americans,” the company said in a release.

The campaign opens with ads *The New York Times*, *The Wall Street Journal*, *Washington Post*, *USA Today*, *The Star-Ledger*, *Barron’s* and the *Financial Times*, and will include television, outdoor advertising, digital, business, general interest and trade media.

In short videos featured on a [website](#) created for the campaign, Prudential executives and industry experts discuss common financial challenges, including achieving lifetime income security, managing risk in pension plans and investments, delivering cost effective benefits to employees and providing adequate insurance coverage.