

# The New Retirement: Will You Be Ready?



## HOST BIO: **Surya Kolluri**

Surya Kolluri leads Thought Leadership efforts for Bank of America's Retirement & Personal Wealth Solutions group. In this capacity he oversees research and programs in the areas of longevity, retirement, and environmental, social and governance (ESG), and manages the firm's relationships with the Stanford Center on Longevity, MIT AgeLab, Wharton Pension Research Council, Boston College Center for Retirement Research and the Gerontological Society of America.

Surya has spoken at a number of global forums on the topics of longevity, cognitive decline, caregiving and social impact investing. He has also presented to students and researchers on these topics at Harvard, Brown, Yale, Stanford and the University of Pennsylvania.

Prior to his current role, Surya held a variety of positions at Bank of America, including head of strategy, business support executive and channel development manager. Surya joined the firm in 2006 after spending 14 years as a strategy management consultant with consulting firms Bain & Company and A.T. Kearney.

Surya currently serves on the boards of the Wharton Pension Research Center and the Massachusetts/New Hampshire Chapter of the U.S. Alzheimer's Association. He is a member of the Global Committee Leadership Group at the Defined Contribution Institutional Investment Association (DCIIA), and he serves as a corporate member of the Global CEO Initiative on Alzheimer's Disease (CEOi) and the Global Coalition on Aging (GCOA).

Surya holds an MBA from the Wharton School of the University of Pennsylvania and a Master of Science from Drexel University, in Philadelphia.