Celebrating 20 Years of Being WISER

WISER Hero Awards

Honoring Individuals Who Make a Difference

Tuesday, September 20, 2016

The Terrace at 101 Constitution
101 Constitution Avenue, N.W. Washington, DC

WISER
Women’s Institute for a Secure Retirement
September 20, 2016

Dear Friend,

We are grateful for the many friends and supporters who have been with us for the past 20 years as we reach out to women across the nation. WISER began in 1996 with a launching grant in memory of Senator John Heinz to provide women with information about their future economic security. Since then, WISER has helped millions of women take financial control of their lives.

Over the years, WISER has built partnerships and collaborated with many diverse organizations that have helped us reach women through unique and creative ways. For example, a widow's project with the United Auto Workers to educate members about the need to choose a survivor's benefit for spouses; a program for churches in Atlanta, Georgia; and thousands of training sessions and workshops for our many partners. We have devised curricula for GED programs, domestic violence programs, adult protective services and nurses. WISER also sponsors the iOme Challenge, a national collegiate competition to engage younger generations in developing retirement solutions. In rural West Virginia and Ohio, we established a highly successful savings project for childcare workers, and recently we began a project with the U.S. Bureau of Prisons for women transitioning back into the community. Several of WISER’s publications have won awards and are highly sought after. Our award winning guide, Financial Steps for Caregivers, developed as part of our National Resource Center on Women and Retirement Planning and re-released with our partner Transamerica, is still one of the only retirement guides for caregivers in the marketplace.

Looking ahead, we still have more work to do. It seems the deck is still stacked against women – they live longer, earn less, and have the prime caregiving responsibility for both children and the older generation. As an increasing number of women reach retirement age, it becomes more necessary to provide them with basic decision-making skills and help finding resources in their local communities. We know women want financial help, and how grateful they are when they receive it. That’s why continuing WISER’s work is so crucial. We are the only organization that provides women with fundamental financial tools and basic retirement information. Thank you for joining with us and making it possible!

Cindy Hausman
WISER President

Shawn Hausman
WISER Chair of the Board

Special Thanks

A special thanks to WISER’s Board, Advisory Council, WISER Fellows and Advisors, staff and volunteers for their hard work. And to those individuals who have lent their time and talents to WISER in numerous ways over the past 20 years, including: Alane Dent, Laurel Beedon, Phyllis Borzi, Diane Browning, Judy Chapa, Julie Conway, Sandy Cook, John Cutler, Jack Dolan, Vickie Elisa, Dianne Freeman, Cheryl Gannon, Sharon & Jason Geno, Matt Greenwald, Cole Haddock, Shawn Hausman, Nell Hennessey (in memoriam), Amy Hinojosa, Pat Humphlett, Melissa Kahn, Beth Koblner, Judith Kozlowski, Michael Kreps, Jeffrey Lewis, Brian Lindberg, Donna MacFarland, Aldrena McMillan, Shaun O’Brien, Pamela Perun, Donna Purchase, Anna Rappaport, Dallas Salisbury, Carol Seifert, Kathy Stokes, Linda K. Stone, Jody Strakosch, Sandra Timmermann, Rusty Toler, Selma Tropp, Elizabeth Vale, Elizabeth Varley, and Patrice Willoughby.

Acknowledgements

WISER offers grateful acknowledgement to the U.S. Administration on Aging for its generous funding of our educational programs. Their support makes it possible for us to provide low-income and minority women with basic retirement and financial management tools through the National Resource Center on Women and Retirement Planning.
2016 WISER Hero Awards

Honoring Individuals Who Make a Difference

FRANK ABAGNALE

CATHERINE COLLINSON

JAMES FIRMAN

MARY BETH FRANKLIN

ROBERT L. JOHNSON

MAUREEN KELLY

JIM MAHANEY

THE HONORABLE PATTY MURRAY

THE HONORABLE PAT TIBERI

About Our Honorees

Frank Abagnale, Author, Lecturer & Consultant, Abagnale & Associates

Mr. Abagnale is one of the world’s most respected authorities on forgery, embezzlement, and secure documents. For over 40 years he has worked with, advised, and consulted with hundreds of financial institutions, corporations and government agencies, helping them provide preventive information to the general public so that older individuals are not victimized by fraud.

Catherine Collinson, President of Transamerica Institute® and Transamerica Center for Retirement Studies®

As President of the nonprofit Transamerica Center for Retirement Studies, Ms. Collinson oversees all research, publications and outreach initiatives, including the Annual Transamerica Retirement Survey.

As a champion for Americans who are at risk of not achieving a financially secure retirement, she has spotlighted the Saver’s Tax Credit which is an important savings incentive available to moderate- and low-income workers and households.

James Firman, President & CEO, National Council on Aging

Under Mr. Firman’s leadership, NCOA has developed and championed many nationally acclaimed programs to improve the health, independence, and economic security of older adults. The Benefits Checkup online tool has helped more than 4 million people find over $15 billion worth of benefits. In 2015, NextAvenue named Mr. Firman to their inaugural Influencers in Aging list.
Mary Beth Franklin, Investment News

Ms. Franklin is a contributing editor at Investment News. During her years as a veteran journalist, Capitol Hill reporter, and retirement and tax editor at a national magazine, Ms. Franklin has written extensively about the latest research and thought leadership on retirement income planning. More recently, she has become the go-to expert on Social Security benefits, providing much needed claiming guidance for American workers.

Robert L. Johnson, Founder & Chairman of the RLJ Companies; Chairman, Retirement Clearinghouse Board of Directors; and Former CEO & Founder, Black Entertainment Television

Mr. Johnson is the Founder and Chairman of The RLJ Companies, an innovative business network that provides strategic investments in a diverse portfolio of companies including private equity, financial services, and asset management. He has provided steadfast advocacy for building assets in the minority community, launched the auto-portability model which ensures that retirement savings assets automatically move with workers as they change jobs; the process will help preserve benefits for millions of workers for decades to come.

Maureen Kelly, Founder & President, Thanks Mom & Dad Fund, and formerly the Business & Community Liaison of the Atlanta Regional Commission’s Aging Division.

Ms. Kelly is the founder and President of the Thanks Mom & Dad Fund® which is a foundation created to support aging programs and services. With the Atlanta Regional Commission, she was responsible for programs in the areas of advocacy, marketing, development, employment and public-private partnerships. She has worked with WISER for more than sixteen years helping to educate leaders and women about the important issues impacting their financial security.

Jim Mahaney, Vice President, Strategic Initiatives, Prudential

Mr. Mahaney is a Vice President with the Strategic Initiatives unit of Prudential. His focus is currently in the area of research and thought leadership for the firm. In this capacity, he has authored several groundbreaking research papers primarily focused on key retirement-related issues, including the financial complications of divorce and widowhood, the importance of optimizing Social Security claiming and the change in marriage benefits for LGBT couples after the 2015 Supreme Court decision. At Prudential, Jim has been awarded three patents from the U.S. Patent Office as a result of his development of products for individuals to use for retirement.

The Honorable Patty Murray, United States Senate, Washington State

Senator Patty Murray has a proven track record spanning more than two decades of fighting for Washington State in the United States Senate. Serving as a member of Senate Democratic leadership since 2007, Senator Murray has established herself as a tireless and effective leader on several issues, in particular those affecting women and their families. These issues include retirement, healthcare and education. Senator Murray is currently Ranking Member of the Senate Health, Education, Labor, and Pensions Committee.

The Honorable Pat Tiberi, United States House of Representatives, 12th District of Ohio

Congressman Tiberi was first elected to serve the people of Ohio’s 12th Congressional District in November 2000. Since entering the U.S. House, he has worked to further policies seeking lower taxes, greater national security and a growing and expanding economy that creates jobs. Congressman Tiberi is a senior member of the House Ways and Means Committee that has jurisdiction over tax issues, Medicare, Medicaid, Social Security, and trade agreements.
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National Endowment for Financial Education
ACLI Congratulates WISER on its 20th Anniversary!

We applaud your efforts in promoting women’s retirement security and “personal pensions” that guarantee lifetime income.
Retirement Clearinghouse, an RLJ Company, is proud to celebrate 20 years of being

Retirement Clearinghouse supports the WISER mission to improve the long-term financial quality of life for women through our efforts to promote retirement savings portability, reduce cash-out leakage and encourage consolidation of retirement savings.

An Automatic Rollover Program Re-oriented

Move balances forward - Auto Portability plugs cash out leakage by keeping assets in the retirement system.

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Prudential congratulates

WISER

ON 20 YEARS OF HELPING WOMEN ACHIEVE A MORE SECURE RETIREMENT.

We applaud the work of our colleague Jim Mahaney and all the Hero Award winners for their efforts in securing the economic future of American men and women.
Supporting the WISER mission...

a lifetime of financial security for women everywhere.

Congratulations to Transamerica Center for Retirement Studies® Executive Director Catherine Collinson, a 2016 WISER Hero Award winner for her meaningful contributions to promoting a secure financial future for women, and all Americans.

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www.transamericainstitute.org
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Carol Wakefield
Alexandra Warhol
Spencer Williams
Congratulations WISER on your 20th anniversary and all that you've accomplished!

A special thank you to Cindy Hounsell for her outstanding leadership.

It is a pleasure working together on our shared mission to improve income security in retirement, especially on behalf of women.

CONGRATULATIONS ON 20 YEARS OF SUCCESS!

SIFMA is proud to be partnering with WISER to help increase awareness for senior investor protection. By 2030, seniors aged 65+ will account for 18% of the nation's population. Our joint efforts help to educate broker dealers and their clients to protect their assets for a secure retirement.
Congratulations WISER! There may be no single group out there who is doing more for “retirement” than WISER. Thank you for making it count where it needs to count. For the people we serve!

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Congratulations to WISER on celebrating 20 years of success!

“WISER is a valuable partner to DCIIA in its efforts to improve retirement security. We are looking forward to building on that partnership in the years to come.”

—Lew Minsky, DCIIA President & CEO
Congratulations to Cindy Hounsell and WISER on an amazing twenty years of educating, supporting, and inspiring women!

Thanks for all the important work you've done. Here's to your continuing success as you help women to create a secure retirement.

Happy Anniversary!

Mark Evan Chimsky
Editor of
25 Women Who Survived Cancer

and
Not Your Mother’s Retirement

markchimskyeditorial.com

We congratulate WISER on its first 20 years, and we look forward to working together in the decades to come to improve retirement security for all Americans.

Save the Date:
National Retirement Planning Week®
April 3-7, 2017
RetireOnYourTerms.org

Consumers need easy-to-use resources to plan for retirement.
Together, we can help.
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Mocha Moms
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Mothers Voices Georgia
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National Adult Day Services Association
National Adult Protective Services Association
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National Asian-Pacific American Legal Consortium
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Zeta Phi Beta
The Women’s Institute for a Secure Retirement (WISER) is dedicated to education and advocacy that will improve the long-term financial quality of life for women. As the only organization to focus exclusively on the unique financial challenges that women face, WISER supports women’s opportunities to secure adequate retirement income through research, workshops, and partnership.

www.WiserWomen.org

Last But Not Least, Thanks to Our Publications Team:
Illustration: Margaret Scott
Graphic Design: Mary Pettigrew, ampersand graphic design, inc.
Printing: Mt. Vernon Printing