New Perspectives: An Intergenerational Discussion on Retirement Solutions  
June 19, 2019  
101 Constitution Ave, NW, 7th Floor, Washington DC

Agenda

1:00 – 1:30pm  Registration, Refreshments, & Networking

1:30 – 1:40pm  Welcome and Opening Remarks  
Cindy Hounsell, President, WISER & Shawn Hausman, Chair, WISER Board

1:40 – 2:00pm  Keynote Speaker  
Senator Martha McSally (R-Arizona) (invited)  
Representative Gwen Moore (D-Wisconsin) (invited)

2:00 - 2:45pm  Panel I: Setting the Stage  
*Delay, Delay, Delay: Retirement, Marriage and Mayonnaise*

John Scott, Gretchen Livingston, and Dan Le Duc  
Pew Charitable Trust & Pew Foundation

2:45 – 3:50pm  Panel II: Navigating Retirement Issues  
*529 Plans – Bigger is Probably Better!*: Jake Spiegel, Morningstar  
*Innovative Model Savings Programs*: Benjamin White, Aspen Institute  
*Retirement Roadblocks*  
*Myths about Investing*: Gary Mottola, FINRA Investor Education Foundation  
*Cashing Out: Women vs Men*: Tom Johnson, Retirement Clearinghouse  
*Latinas Savings Programs*: Amy Hinojosa, MANA, A National Latina Organization  
Moderator: Melissa Kahn, State Street Global Advisors

3:50 - 4:50pm  Panel III: 2019 iOme Challenge Winners – Introduced by Cheryl Gannon  
*Moderators*: Dallas Salisbury, WISER HERO & Kathy Stokes, AARP.  
*Discussant*: Evan Avila, 2018 iOme Winner.  
iOme 2019 Winners: John Ruf (Team Leader), Cole Peppin, Zach Rosenbaum, and Emanuel Oliveira (Faculty Advisor) from Michigan Technological University

2019 iOme Challenge Question

You have been appointed by the 116th Congress as members of the 2019 Independent Commission on Retirement Security. The retirement system needs to be re-evaluated and a comprehensive approach needs to be developed to modernize efforts in support of more efficient and effective programs that help Americans plan and save for retirement. Your job as a Gen Z’er entering the workforce is to bring a new perspective to the Independent Commission and develop a comprehensive proposal to improve one or all of the three pillars of the nation’s retirement system for all generations.

4:50 – 5:30pm  Panel IV: Congressional Panel - Legislative & Regulatory Action  
*Moderator*: Brian Lindberg, Sarah Khasawinah, Senate Special Committee on Aging; Kendra Isaacson, Senate Health Education, Labor & Pensions Committee; Carrie Hughes, House Committee on Education and Labor; Kara Getz, House Ways & Means Committee

5:30 - 7:15pm  Reception, 9th Floor Rotunda Room