



***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**