



**What Do Women Really Want? A Secure Retirement and Strategies to Achieve It.
*A Symposium on Financial Solutions for Women***

October 2, 2019

Agenda

- 12:30 – 1:20pm** **Registration, and Networking (light lunch/refreshments)**
- 1:20 – 1:30pm** ***Welcome and Opening Remarks***
Cindy Hounsell, President, WISER
Shawn Hausman, WISER Board Chair
- 1:30 – 1:50pm** **Mary Lazare, Principal Deputy Administrator, Administration for
Community Living, U.S. Department of Health and Human Services**
- 1:50– 2:50pm** ***Panel I: Researching Opportunities for Better Results***
Judith Ward, T. Rowe Price (Generation Gaps)
Cindy Hoes, Nationwide (Recent Research/Health Costs)
Beth Almeida, Cove Research (Emergency Savings/Latinas)
Warren Cormier, DCIIA (Behavioral Finance & Risk)
Moderator: Josh Cohen, PGIM
- 2:50 – 3:50pm** ***Panel II: Key Issues Affecting Outcomes***
Renee Wilder Guerin, Thrift Savings Plan
Karen Kali, NCRC (Aging & Affordable Housing Issues)
Liza Tyler, TIAA (Retirement Income)
Lisa Bleier, SIFMA (Financial Fraud – FINRA Rule)
Moderator: Catherine Harvey, AARP
- 3:50 – 4:50pm** ***Panel III: Strategies Leading to Action***
Katherine Roy, J.P. Morgan (Retirement & Roth 401(k)s)
Jim Mahaney, Prudential (HSAs & Married Women)
Laura Varas, Hearts & Wallets (Wellness & Advice Choices)
Spencer Williams, Retirement Clearinghouse (Preserving Small Balances)
Moderator: Catherine Reilly, WISER Research Advisory Council
- 4:50 – 5:30pm** **Congressional Panel: Lori Prater, House Ways & Means; Kevin McDermott,
House Education & Labor; Tommy Nyugen, HELP Committee, Senator Isakson
(R-GA); Britt Weinstock, HELP Committee, Senator Sanders (D-VT)**
Moderator: Patrice Willoughby, Signal Group
- 5:30 - 7:30pm** **Reception - 9th Floor Rotunda Room**