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