The Gender Story: A Symposium on Retirement Solutions for Women
September 19, 2017

Agenda

1:00 – 1:30pm Registration, and Networking (light lunch/refreshments)

1:30 – 1:35pm Welcome and Opening Remarks
Cindy Hounsell, President, WISER

1:35 – 2:00pm Dialogue: The Gender Story
Kerry Hannon, author and personal & retirement finance journalist
Lena Rizkallah, J.P. Morgan
Jennifer Putney, Portfolio Evaluations, Inc.

2:00 – 2:50pm Panel I: Research and Strategies
Janice Co, Prudential Retirement – Retirement Income Gender Gap
Hector De La Torre, Transamerica Center for Health Studies – Caregiving Study
Catherine Collinson, Transamerica Center for Retirement Studies
Andrew Melnyk, ACLI
Moderator: Christina Cutlip, TIAA

2:50 – 3:05pm Guest Speaker: Mary Lazare, ACL’s Principal Deputy Administrator (HHS)

3:05 – 3:55pm Panel II: A Ripple Effect – Expanding Retirement Literacy & Retirement Income
Roberta Rafaloff, MetLife - Pot of Gold report
Paolo Narciso, AARP Foundation – Short-term savings leading to retirement savings
Jay Johnson, Medicare Rights Center – Managing the Medicare Maze
Liz Loewy, EverSafe – Financial Fraud
Moderator: Ted Goldman, American Academy of Actuaries

3:55 – 4:55pm Panel III: Opportunities for Change?
Shai Akabas, Bipartisan Policy Center – Big Picture reforms
Melissa Kahn, State Street Global Advisors – Coverage
Toni Brown, Capital Group – Investing issues
Kelli Hueler, Hueler Companies – Lifetime income
Spencer Pringle, Retirement Clearinghouse – Cashing out decisions
Moderator: Lew Minsky, DCIIA

4:55 – 5:30pm Congressional Panel: Saat Alety, Office of Sen. Tim Scott (R-SC); Kendra Isaacson, Senate HELP Committee; Aharon Friedman, House Ways and Means Committee (invited); Kara Getz, House Ways & Means Committee; Wrap-Up: Diana Hodges, Save our Savings Coalition; Moderator: Patrice Willoughby, Invariant Government Relations

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