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