**Agenda**

2:30 – 2:35pm **Welcome**
Madeline Rapp, Emcee – Dimensional Fund Advisors
Cindy Hounsell, WISER President
Shawn Hausman, Board Chair

2:35 – 2:50pm **Keynote Speaker**
MaryBeth Franklin, *Investment News*

2:50 – 3:40pm **Panel I – Navigating the Retirement Roadblocks**
The Big Three: Access; Distributions & Roll Overs; Education
**Moderator:** Aaron Borders, Dimensional Fund Advisors
**Access:** Aron Szapiro, Morningstar
**Auto Portability:** Spencer Williams, Retirement Clearinghouse
**Consumer Education:** Lynne Ford, ICMA-RC

3:40 – 3:50pm **Break**

3:50 – 4:20pm **Panel II – 2020 iOme Challenge Winners**
**Moderator:** Jean Setzfand, AARP
iOme 2020 Winner: David Nipper, Folsom Lake College, California

4:20 – 4:50pm **Panel III – Congressional Panel**
**Legislative Update**
**Moderators:** Michael Kreps, Groom Law Group and Kathleen Coloumbe, ACLI
**Panelists:** Drew Crouch, Senate Finance; Kara Getz, House Ways & Means; Kendra Isaacson, Senate Health, Education, Labor & Pensions; Kevin McDermott, House Education & Labor; Lori Prater, House Ways & Means (Minority Staff)

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**2020 iOme Challenge Question**

You have been appointed by the 116th Congress as members of the 2020 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 in order to improve their chances of living a financially secure retirement.
- Your proposal should include both broad policy solutions, as well as policies that target the needs and challenges of specific population segments you believe the commission should prioritize.
- Further, you may want to recommend policies both to promote increased retirement savings and to improve the income options to prevent individuals from running out of savings in retirement.