



Moving Forward: Building, Expanding and Strengthening Women's Retirement Security

A Symposium on Financial Solutions for Women

October 2, 2020

Agenda

- 1:00 – 1:10pm** **Welcome and Opening Remarks**
Madeline Rapp, *Emcee* – Dimensional Fund Advisors
Cindy Hounsell, President, Women's Institute for a Secure Retirement (WISER)
Shawn Hausman, Board Chair, Women's Institute for a Secure Retirement (WISER)
- 1:10 – 1:20pm** **Introduction:** Patrice Willoughby, Signal Group
Keynote Speaker: Susan Neely, President & CEO, ACLI and
Co-chair - National Chamber of Commerce/Financial Literacy Campaign
- 1:20 – 2:00pm** **Panel I: Meet the Authors - Getting Better Results**
Kerry Hannon, *Great Pajama Jobs: Your Complete Guide to Working from Home* and
The Entrepreneur's Guide to Starting A Business Mid-Life
Mary Gatta, *Waiting for Retirement* (Restaurant Workers)
Eleanor Blayney, *Women Wise* (Toughest Planning Issues)
Moderator: Melissa Kivett, SVP Prudential (Changing the Odds for Women)
- 2:00 – 2:35pm** **Panel II: Issues Affecting Outcomes**
Katherine Roy, J.P. Morgan (Covid-19 & Household Spending)
Cindy Hoes, Nationwide Institute (Medicare Tools for Consumers & Financial Advisors)
Lisa Bleier, SIFMA (Industry Solutions for Preventing Financial Fraud)
Moderator: Amy Hinojosa, MANA, A National Latina Organization (Emergency Funds)
- 2:35 – 2:45pm** **Break**
- 2:45 – 3:30pm** **Panel III: Strategies Leading to Action**
Catherine Collinson, Transamerica Institute
(5 Winning Ways Employers Can Improve Benefits)
Cindy Goff, ACLI (Voluntary Benefits-Paid Family Leave)
Anne Ollen, TIAA (Women & Financial Literacy)
Jody Strakosch, Strakosch Retirement Strategies (Lifetime Income)
Moderator: Drew Carrington, SVP, Franklin Templeton
- 3:30 – 4:00pm** **Introduction:** Kim Ginsburg, Dimensional Fund Advisors
Keynote Speaker: Dr. Robert Merton (1997 Nobel Prize) *Lifetime Income* (Impact of
Retirement Income: Challenges, Consumption, Communication and Risk Management)
- 4:00 – 4:10pm** **Wrap Up and Thank You**