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
Mary Gatta, Waiting for Retirement (Restaurant Workers)
Eleanor Blayney, Money 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