



***The Millennial Perspective:
An Intergenerational Discussion on Retirement Solutions***

June 21, 2017

Agenda

- 1:00 – 1:30pm** **Registration, Refreshments, & Networking**
- 1:30 – 1:45pm** **Welcome and Opening Remarks**
Cindy Hounsell, President, WISER
Governor Dirk Kempthorne, President and CEO, ACLI
- 1:45 – 2:15pm** **Speaker: Honorable Joyce B. Beatty (D-OH)**, Financial Literacy Caucus
Introduced by: Judy Chapa, Financial Services Roundtable
- 2:15 - 3:30pm** **Panel I: Setting the Stage & the Future of the Millennials' Retirement**
Moderator: Jason Fichtner, Mercatus Center at George Mason University.
Part A: How Millennials Look at Financial Issues
Melissa Hooker, Wells Fargo; and James Mahaney, Prudential
Part B: Removing Retirement Roadblocks
Spencer Williams, Retirement Clearinghouse (preserving retirement income);
Paul Harbaugh, FlexWage Solutions (avoiding payday loans); Stacy Canan,
Consumer Financial Protection Bureau (seniors paying student loans); Andy Remo,
American Retirement Association (Health Savings Accounts); Jessica Strieter
Elting, Aflac (voluntary benefits); *Discussant:* Josh Cohen, PGIM
- 3:30 - 4:30pm** **Panel II: 2017 iOme Challenge Winners – A Dialogue**
Discussants: Dallas Salisbury, EBRI Fellow; Jean Setzfand, AARP
iOme 2017 Winning Team: Yankang (Bennie) Chen, Columbia University; Jiayu
(Kamessi) Zhao, Columbia University; Siheng (Asa) Li, Amherst College; and
Qiufeng (Joseph) Zhang, Duke University

2017 iOme Challenge Question: *The President believes that Millennials face some unique financial challenges. And that addressing the financial concerns of Millennials will have substantial economic impact for the future of the Millennial Generation. Two of the major financial challenges that face Millennials are substantial college debt and the lack of saving for retirement. These two challenges are naturally linked to one another. Paying off large college indebtedness means those funds cannot be set aside for retirement. Develop a policy proposal that will solve or ease the burden of college debt for Millennials. If the college debt burden is eased, what incentives can be developed to ensure that the money saved can be channeled into savings for retirement? Your policy proposal must link these two financial challenges and provide solutions for both.*

- 4:30 – 5:30pm** **Panel III: Congressional Panel - Legislative & Regulatory Action**
Moderator: Michael Kreps, Groom Law Group
Kara Getz, House Ways & Means Committee; Kendra Issacson, Senate HELP
Committee; others TBD
- 5:30 - 7:15pm** **Reception, 9th Floor Rotunda Room**