



***The Millennial Perspective:
An Intergenerational Discussion on Retirement Solutions
June 20, 2018
Agenda***

- 1:00 – 1:30pm** **Registration, Refreshments, & Networking**
- 1:30 – 1:45pm** **Welcome and Opening Remarks**
Cindy Hounsell, WISER
Governor Dirk Kempthorne, ACLI
- 1:45 – 2:00pm** **Keynote Speaker**
Representative Vicente Gonzalez (D-TX) (Invited), Financial Services
- 2:00 – 2:45pm** **Panel I: Getting to Know You: Research on Millennials & Retirement**
Moderator: Sarah Holden, ICI
Jennifer Brown, National Institute on Retirement Security (NIRS); Sudipto Banerjee, T. Rowe Price
- 2:45 – 3:45pm** **Panel II: Issues: Financial Education, Savings & Retirement Roadblocks**
Moderator: Jason Fichtner, Johns Hopkins University
Financial Education: Laura Levine, Jump\$tart Coalition; Amy Hinojosa, MANA, A National Latina Organization
Savings: Joanna Smith-Ramani, Aspen Institute, Financial Security Program
Retirement Roadblocks: Nevin Adams, American Retirement Association; Tom Johnson, Retirement Clearinghouse
- 3:45 - 4:30pm** **A Dialogue with the 2018 iOme Challenge Winner**
Moderator: Jason Fichtner, Johns Hopkins University
Discussants: Ted Goldman, Academy of Actuaries, and Kathy Stokes, AARP
iOme 2018 Winner: Evan Avila, UMBC, and faculty advisor Professor Douglas J. Lamdin, Department of Economics, UMBC

2018 iOme Challenge Question: *Congress has invited a Team of millennials to join the Special Bipartisan Task Force to address the nation's growing retirement crisis. A special emphasis will be placed on increasing retirement savings opportunities for millennials at the workplace and independently. You are tasked with developing a comprehensive policy proposal that will address challenges and result in more millennials saving for retirement. The policy proposal may include, but is not be limited to: 1) Ideas to expand the number of employers that offer plans to traditional and nontraditional workers; 2) Ideas to encourage gig economy workers to participate in retirement savings; 3) Ideas to encourage more employees to participate in the plans offered to them; 4) Ways that tax or other government policy can be used to increase savings; and 5) How to use online resources and social media to facilitate awareness and increase savings.*

- 4:30 – 5:30pm** **Dialogue Congressional Panel - Legislative & Regulatory Action**
Moderator: Patrice Willoughby, Invariant Government Relations
Kara Getz, House Ways & Means Committee; Kendra Isaacson, Senate HELP Committee; Saat Alety, Senator Scott's Office
- 5:30 - 7:30pm** **Reception, 9th Floor Rotunda Room**