



***The Gender Story: A Symposium on Retirement Solutions for Women***

September 19, 2017

**Agenda**

- 1:00 – 1:30pm**      **Registration, and Networking (light lunch/refreshments)**
- 1:30 – 1:35pm**      **Welcome and Opening Remarks**  
Cindy Hounsell, President, WISER
- 1:35 – 2:00pm**      **Dialogue: The Gender Story**  
Kerry Hannon, author and personal & retirement finance journalist  
Lena Rizkallah, J.P. Morgan  
Jennifer Putney, Portfolio Evaluations, Inc.
- 2:00 – 2:50pm**      **Panel I: Research and Strategies**  
Janice Co, Prudential Retirement – *Retirement Income Gender Gap*  
Hector De La Torre, Transamerica Center for Health Studies – *Caregiving Study*  
Catherine Collinson, Transamerica Center for Retirement Studies  
Andrew Melnyk, ACLI  
**Moderator: Christina Cutlip, TIAA**
- 2:50 – 3:05pm**      **Guest Speaker: Mary Lazare, ACL’s Principal Deputy Administrator (HHS)**
- 3:05 – 3:55pm**      **Panel II: A Ripple Effect – Expanding Retirement Literacy & Retirement Income**  
Roberta Rafaloff, MetLife - *Pot of Gold report*  
Paolo Narciso, AARP Foundation – *Short-term savings leading to retirement savings*  
Jay Johnson, Medicare Rights Center – *Managing the Medicare Maze*  
Liz Loewy, EverSafe – *Financial Fraud*  
**Moderator: Ted Goldman, American Academy of Actuaries**
- 3:55 – 4:55pm**      **Panel III: Opportunities for Change?**  
Shai Akabas, Bipartisan Policy Center – *Big Picture reforms*  
Melissa Kahn, State Street Global Advisors – *Coverage*  
Toni Brown, Capital Group – *Investing issues*  
Kelli Hueler, Hueler Companies – *Lifetime income*  
Spencer Pringle, Retirement Clearinghouse – *Cashing out decisions*  
**Moderator: Lew Minsky, DCIIA**
- 4:55 – 5:30pm**      **Congressional Panel: Saat Alety, Office of Sen. Tim Scott (R-SC); Kendra Isaacson, Senate HELP Committee; Aharon Friedman, House Ways and Means Committee (invited); Kara Getz, House Ways & Means Committee; Wrap-Up: Diana Hodges, Save our Savings Coalition; Moderator: Patrice Willoughby, Invariant Government Relations**
- 5:30 - 7:30pm**      **Reception - 9<sup>th</sup> Floor Rotunda Room**