



Retirement Income: Strategies, Choices, and Decisions
A Symposium hosted by the Women's Institute for a Secure Retirement
September 26, 2018

AGENDA

- 12:30pm – 1:00pm** Registration, and Networking (light lunch/refreshments)
- 1:00pm – 1:05pm** **Welcome, Opening Remarks & Introduction of Assistant Secretary Rutledge**
Cindy Hounsell, WISER President & Shawn Hausman, WISER Board Chair
- 1:05pm – 1:40pm** **Keynote Speaker:** Preston Rutledge, Assistant Secretary of Labor, EBSA
- 1:40pm – 2:10pm** ***A Dialogue: Closing the Retirement Income Gaps***
Virginia (Gina) Wilson, CFO, TIAA
Moderator: Seth Harris, Alliance for Lifetime Income
- 2:10pm – 2:55pm** ***Strategies: What do People Know About Retirement Income Strategies***
Catherine Hill, Women's Caucus, Maryland General Assembly
Catherine Reilly, State Street Global Advisors
Mary Beth Franklin, Author & Personal Finance Journalist
Moderator: Dallas Salisbury, Long Term Care Quality Alliance
- 2:55pm – 3:45pm** ***Choices: Helping Women (and Men) Evaluate Retirement Income Choices***
Jody Strakosch, Strakosch Retirement Strategies, LLC
Keith Bernhardt, Fidelity Investments
Chris Anast, Capital Group
Kelli Hueler, Hueler Companies
Michael Sasso, Portfolio Evaluations
Moderator: Reshma Kapadia, Barron's Magazine
- 3:45pm – 4:45pm** ***Avoiding Harmful Retirement Decisions: Helping People Become Better Informed***
Nora Super, Milken Institute, Center for Future of Aging – *Longevity Issues*
James Mahaney, Prudential Retirement – *Divorce Hurts Women's Financials*
Spencer Williams, Retirement Clearinghouse - *Auto Portability & Rollovers*
Suzanne McGovern, SEC Office of Investor Education – *Financial Literacy*
Bob Blancato, Elder Justice Coalition – *Financial Fraud*
Moderator: Lew Minsky, DCIA
- 4:45pm – 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; Kara Getz, House Ways & Means Committee; Kyle Hauptman, Office of Sen Tom Cotton (R-AR); Moderator: Michael Kreps, Groom Law Group
- 5:30 - 7:30pm** **Reception – Rooftop Terrace – TIAA Sponsor and 100th Anniversary Celebration**