



**What Do Women Really Want? A Secure Retirement and Strategies to Achieve It.  
*A Symposium on Financial Solutions for Women***

**October 2, 2019**

**Agenda**

- 12:30 – 1:20pm**      **Registration, and Networking (light lunch/refreshments)**
- 1:20 – 1:30pm**      ***Welcome and Opening Remarks***  
Cindy Hounsell, President, WISER  
Shawn Hausman, WISER Board Chair
- 1:30 – 1:50pm**      **Mary Lazare, Principal Deputy Administrator, Administration for  
Community Living, U.S. Department of Health and Human Services**
- 1:50– 2:50pm**      ***Panel I: Researching Opportunities for Better Results***  
Judith Ward, T. Rowe Price (Generation Gaps)  
Cindy Hoes, Nationwide (Recent Research/Health Costs)  
Beth Almeida, Cove Research (Emergency Savings/Latinas)  
Warren Cormier, DCIIA (Behavioral Finance & Risk)  
*Moderator: Josh Cohen, PGIM*
- 2:50 – 3:50pm**      ***Panel II: Key Issues Affecting Outcomes***  
Renee Wilder Guerin, Thrift Savings Plan  
Karen Kali, NCRC (Aging & Affordable Housing Issues)  
Liza Tyler, TIAA (Retirement Income)  
Lisa Bleier, SIFMA (Financial Fraud – FINRA Rule)  
*Moderator: Catherine Harvey, AARP*
- 3:50 – 4:50pm**      ***Panel III: Strategies Leading to Action***  
Katherine Roy, J.P. Morgan (Retirement & Roth 401(k)s)  
Jim Mahaney, Prudential (HSAs & Married Women)  
Laura Varas, Hearts & Wallets (Wellness & Advice Choices)  
Spencer Williams, Retirement Clearinghouse (Preserving Small Balances)  
*Moderator: Catherine Reilly, WISER Research Advisory Council*
- 4:50 – 5:30pm**      **Congressional Panel: Lori Prater, House Ways & Means; Kevin McDermott,  
House Education & Labor; Tommy Nyugen, HELP Committee, Senator Isakson  
(R-GA); Britt Weinstock, HELP Committee, Senator Sanders (D-VT)**  
*Moderator: Patrice Willoughby, Signal Group*
- 5:30 - 7:30pm**      **Reception - 9<sup>th</sup> Floor Rotunda Room**