

The Women's Institute for a Secure Retirement

An Intergenerational Perspective on Retirement Solutions

Annual iOme Challenge Forum – June 23, 2020

Agenda

- 2:30 – 2:35pm **Welcome**
Madeline Rapp, Emcee – Dimensional Fund Advisors
Cindy Hounsell, WISER President
Shawn Hausman, Board Chair
- 2:35 – 2:50pm **Keynote Speaker**
MaryBeth Franklin, *Investment News*
- 2:50 – 3:40pm **Panel I – Navigating the Retirement Roadblocks**
The Big Three: Access; Distributions & Roll Overs; Education
Moderator: Aaron Borders, Dimensional Fund Advisors
Access: Aron Szapiro, Morningstar
Auto Portability: Spencer Williams, Retirement Clearinghouse
Consumer Education: Lynne Ford, ICMA-RC
- 3:40 – 3:50pm **Break**
- 3:50 – 4:20pm **Panel II – 2020 iOme Challenge Winners**
Moderator: Jean Setzfand, AARP
iOme 2020 Winner: David Nipper, Folsom Lake College, California
- 4:20 – 4:50pm **Panel III – Congressional Panel**
Legislative Update
Moderators: Michael Kreps, Groom Law Group and Kathleen Coloumbe, ACLI
Panelists: Drew Crouch, Senate Finance; Kara Getz, House Ways & Means; Kendra Isaacson, Senate Health, Education, Labor & Pensions; Kevin McDermott, House Education & Labor; Lori Prater, House Ways & Means (Minority Staff)



2020 iOme Challenge Question

You have been appointed by the 116th Congress as members of the
2020 Independent Commission on Retirement Security.

- ❁ The retirement system needs to be re-evaluated and a comprehensive approach needs to be developed to modernize efforts in support of more efficient and effective programs that help Americans plan and save for retirement.
- ❁ Your job as a Gen Z'er entering the workforce is to bring a new perspective to the Independent Commission and develop a comprehensive proposal to improve one or all of the three pillars of the nation's retirement system for all generations in order to improve their chances of living a financially secure retirement.
- ❁ Your proposal should include both broad policy solutions, as well as policies that target the needs and challenges of specific population segments you believe the commission should prioritize.
- ❁ Further, you may want to recommend policies both to promote increased retirement savings and to improve the income options to prevent individuals from running out of savings in retirement.

