Moving Forward: Building, Expanding and Strengthening Women's Retirement Security

A Symposium on Financial Solutions for Women
October 2, 2020

PRESENTER BIOS

Eleanor Blayney
Eleanor Blayney has spent her thirty-year professional career as a Certified Financial Planner, Consumer Advocate, professional speaker, and author. She has always believed that good financial advice requires more than technical competence and ongoing-education. It also requires the wisdom gained from personal experience. To this end, Ms. Blayney wrote *Women's Worth: Finding Your Financial Confidence* (2010), drawing on her own experience as a working woman, mother, and business owner to speak from the "inside out" to working women facing the big financial decisions of midlife. In 2020, Ms. Blayney and her colleague Ms. Marjorie Fox, JD,CFP® decided to collaborate on another book focused on women in retirement. While most financial advice focuses on getting individuals TO retirement, there is very little to guide them *through* retirement, in terms of the many important choices and changes they must make. In their forthcoming book, *Women Wise*, Ms. Blayney and Ms. Fox draw on their own experiences as retired women living on their own – a situation similar to the majority of women in their 70s and beyond – to share again from the "inside out" the difficult decisions and choices that must be made by women in their later years.

Lisa J. Bleier
Lisa J. Bleier is Managing Director and Associate General Counsel at SIFMA, and head of the Private Client, Retirement & State Government Affairs teams. In this capacity, she supervises and coordinates SIFMA's outreach to members of Congress and government regulators on retirement and senior investor matters, as well as managing the teams engaged in state issues and retail issues. Ms. Bleier is also on the Board of the NAPSA National Institute on Elder Financial Exploitation, Co-Chair SIFMA's Senior Investor Protection Initiative, and the Chair of the American Bar Association Section on Taxation Employee Benefits Legislation Subcommittee. Ms. Bleier holds a J.D. from the University of Pittsburgh School of Law and a B.A. from the University of Michigan.

Drew Carrington
Drew Carrington is a Senior Vice President and leads Franklin Templeton's defined contribution business within the U.S. institutional large market segment. His responsibilities include presenting the firm's capabilities to existing and prospective DC clients and their consultants, as well as understanding and communicating the complex, evolving regulatory landscape of DC plans. Mr. Carrington is former chair of the Retirement Income Committee and current member

of the Retirement Research Board of the Defined Contribution Institutional Investment Association (DCIIA), a nonprofit association dedicated to enhancing the retirement security of American workers. He received a Bachelor of Arts degree from Harvard University.

Catherine Collinson

Catherine Collinson is CEO and president of the nonprofit Transamerica Institute and Transamerica Center for Retirement Studies. Ms. Collinson is a retirement and market trends expert and champion for Americans who are at risk of not achieving a financially secure retirement. She oversees all research and outreach initiatives, including the Annual Transamerica Retirement Survey. In 2016, she was honored with a Hero Award from the Women's Institute for a Secure Retirement (WISER) for her tireless efforts in helping improve retirement security among women. Ms. Collinson earned her bachelor's degree in British and American literature at Scripps College, Claremont, California, and her master's of business administration at the University of California, Irvine.

Dr. Mary Gatta

Dr. Mary Gatta joined the faculty as an Associate Professor of Sociology at City University of New York (CUNY-Guttman) in August, 2015. Prior to her appointment at CUNY, Dr. Gatta served as a Senior Scholar at Wider Opportunities for Women in Washington DC, and as Director of Gender and Workforce Policy at the Center for Women and Work, and Assistant Professor of Labor Studies at Rutgers University. In addition, Dr. Gatta recently served on New Jersey Governor Phil Murphy's Labor and Workforce Development Transition Team.

Kim Ginsburg

Kim Ginsburg has worked in the financial industry for over 20 years. In her current role as Regional Director and Vice President in Dimensional's Retirement Distribution Channel, Ms. Ginsburg brings industry best practices and thought leadership to help to expand and deepen relationships with DCIO national account and field sales relationships. Prior to joining the firm, Ms. Ginsburg served as senior vice president at Morningstar, Inc., where she was responsible for the retirement solutions used by some of the largest insurance companies, plan providers, and plan sponsors in North America, Europe, and Asia. Ms. Ginsburs is an Accredited Investment Fiduciary® and has a BA from the University of Wisconsin-Whitewater.

Cindy Goff

Cindy Goff is Vice President of Supplemental Benefits and Group Insurance at the American Council of Life Insurers (ACLI) where she develops and implements state and federal public policy positions and strategies in collaboration with ACLI member companies to ensure consumers can get the financial protection they want and need. She has more than 30 years of experience in state and federal legislative and regulatory advocacy for insurance issues, including voluntary and group benefits, individual and small group major medical insurance, ERISA, HIPAA and the ACA. Ms. Goff is a graduate of the University of Minnesota.

Kerry Hannon
Kerry Hannon is a leading expert and strategist on work and jobs, entrepreneurship, personal finance and retirement. She is a frequent keynote speaker and podcast and radio commentator. Ms. Hannon is a columnist and regular contributor to *The New York Times, MarketWatch, Forbes and the PBS website NextAvenue.org.* Ms. Hannon is also the author of more than a dozen books, including *Great Pajama Jobs: Your Complete Guide to Working From Home*; *Never Too Old To Get Rich: The Entrepreneurs Guide To Starting a Business Mid-Life*; *Great Jobs for Everyone 50+*; and *Money Confidence*. Her website is *kerryhannon.com.* Follow her on Twitter @*kerryhannon.*

Shawn Hausman
Shawn Hausman is Chair of the Women's Institute for Secure Retirement (WISER) Board of Directors. She has over 35 years of experience as a public affairs and communications professional. Ms. Hausman recently retired from the American Council on Life Insurers, where she served many years as Senior Vice President, Public Affairs. As a member of senior management, she directed all aspects of the association's communications strategies on federal and state issues. This included overseeing major advocacy campaigns on tax and retirement security issues that encompassed message development and research; media and advertising on traditional and digital platforms; and grassroots outreach and coalition building.

Cynthia Hoes
Cynthia Hoes is the Director of Strategy and Programs, Nationwide Retirement Institute. Ms. Hose is a seasoned professional with a deep knowledge of the financial services industry and retirement wellness concepts. Prior to joining Nationwide, Ms. Hoes was an Associate at Franklin Park where she led strategy and the execution of multi-touch client communications including e-newsletters, monthly client calls, and annual cross-client conference call to augment client engagement, satisfaction and knowledge of the firm's private equity products and service offerings. Ms. Hoes earned a BBA in Marketing at Howard University and an MBA in International Marking at Saint Joseph's University – Erivan K. Haub School of Business.

Amy Hinojosa
Amy Hinojosa is the President and CEO of MANA, A National Latina Organization. Previously, she served as Executive Director of the National Association of Hispanic Publications, Inc. (NAHP), NAHP Media LLC, and the National Hispanic Press Foundation (NHPF). Ms. Hinojosa serves on the Board of Directors of the Hispanic Association on Corporate Responsibility and the National Hispanic Leadership Agenda, the Hispanic Technology and Telecommunications Partnership. She is a member of the Diversity Council for the El Rey Network. Ms. Hinojosa is a Huffington Post contributor and writes about issues impacting Latinas. Originally from Baytown, Texas, she is an alumna of the University of St. Thomas in Houston, Texas.

Cindy Hounsell
Cindy Hounsell is the President of the Women's Institute for a Secure Retirement (WISER), a nonprofit organization that she founded in 1996 to improve opportunities for women to secure retirement income and to educate the public about the inequities that disadvantage women in

retirement. An attorney and retirement expert, Ms. Hounsell has testified before Congress and has served as a delegate for a number of White House summits and conferences, including the last two White House Conferences on Aging, the White House Social Security Conference and each of the National Retirement Saver Summits. She has authored many chapters, columns, articles, op-eds, papers and booklets on women and retirement, and has been widely quoted in various media and publications including *The New York Times*, *The Wall Street Journal*, *Forbes/PBS Next Avenue*, *U.S. News and World Report*, *CNN*, *CNBC* and NPR's *All Things Considered, Morning Edition* and *Marketplace.* Ms. Hounsell provides technical assistance to national organizations as well as trainings to leaders and grassroots advocates as the director of the National Resource Center on Women and Retirement Planning. WISER has operated the Center for 20 years with the U.S. Administration on Aging. In 2018, Ms. Hounsell was awarded a lifetime achievement award by the Plan Sponsor Council of America. Ms. Hounsell was also named a 2015 Influencer in Aging by Next Avenue. She was named by *Women's eNews* as one of 21 Leaders for the 21st Century, and *Money* magazine named her one of its 40 Money Heroes.

Melissa Kivett

Melissa Kivett is the Managing Director, Head of Prudential's Enterprise Strategic Relationship Management. She is responsible for strategically catalyzing and deepening relationships with Prudential's most valued partners and industry associations. Ms. Kivett also represents Prudential on the Board of the Insured Retirement Institute and as both Board Secretary and founding member of the Alliance for Lifetime Income, a groundbreaking non-profit, whose mission is to educate and grow the number of protected households in America. She received a BA from the University of Massachusetts and a Master of Business Administration from Columbia Business School. Ms. Kivett serves as a coach with the 92nd Street Y for Women in Power and is a member of the Financial Woman's Association and Columbia Women in Business.

Dr. Robert C. Merton

Dr. Robert C. Merton is the School of Management Distinguished Professor of Finance at Massachusetts Institute of Technology, and the John and Natty McArthur University Professor Emeritus at Harvard University. He was the George Fisher Baker Professor of Business Administration (1988–98) and the John and Natty McArthur University Professor (1998–2010) at Harvard Business School. After receiving a Ph.D. in Economics from MIT in 1970, Dr. Merton served on the finance faculty of MIT's Sloan School of Management until 1988, at which time he was J.C. Penney Professor of Management. He is currently Resident Scientist at Dimensional Holdings, Inc., where he is the creator of Target Retirement Solution, a global integrated retirement-funding solution system. Dr. Merton received the Alfred Nobel Memorial Prize in Economic Sciences in 1997 for a new method to determine the value of derivatives. He is past president of the American Finance Association, a member of the National Academy of Sciences, and a Fellow of the American Academy of Arts and Sciences. Dr. Merton received a B.S. in Engineering Mathematics from Columbia University, a M.S. in Applied Mathematics from California Institute of Technology, a Ph.D. in Economics from Massachusetts Institute of Technology and honorary degrees from sixteen universities.

Susan K. Neely
Susan K. Neely is the president and CEO of the American Council of Life Insurers (ACLI), the nation's leading trade association dedicated to providing products and services that contribute to Americans' financial and retirement security. As president and CEO, Ms. Neely drives public policy and advocacy on behalf of ACLI's member companies that represent 95 percent of industry assets and serve 90 million families. Ms. Neely has long been recognized as a leading voice in public policy and advocacy in Washington, D.C. She served as special assistant to President George W. Bush and helped create the U.S. Department of Homeland Security (DHS), and later became the first DHS Assistant Secretary for Public Affairs. Most recently, she led the American Beverage Association (ABA) for 13 years as president and CEO. A native of Iowa, Ms. Neely holds an undergraduate degree in journalism and French civilization from the University of Iowa and a master's degree in public administration from Drake University.

Anne Ollen
Anne Ollen is a Senior Director of the TIAA Institute, responsible for developing and implementing knowledge-building and public engagement initiatives that serve the higher education leadership community. She was invited to join the Institute when it was established in 1998 and plays a critical role in identifying opportunities for partnerships with like-minded think tanks and other organizations to advance mutual goals. These partnerships can yield research, convenings, publications or other products of value to higher education leaders. Before joining the Institute, Ms. Ollen was manager of TIAA Seminar Development, leading a team responsible for creating content and collateral for financial education forums targeting specific audiences, including HR generalists and benefits administrators, women, people about to retire, and those just starting out in their careers. Ms. Ollen received a M.A. in education from Queens College, City University of New York, and holds a Certified Employee Benefits Specialist designation from The Wharton School.

Madeline Rapp
Madeline Rapp has worked in the financial industry for over 10 years. In her current role as an Associate in Dimensional's Retirement Distribution Channel, she supports the Platform Defined Contribution team in analysis and research, reporting and operations, and virtual content strategy and execution. Ms. Rapp assists the team's Regional Directors in relationship management and business development initiatives with defined contribution, 529, and HSA platform clients. Ms. Rapp joined Dimensional in 2019 after serving for five years as a Senior Service and Operations Specialist for Business Financial Group, an advisory firm in San Antonio, where she managed client service and operations for the Corporate Retirement and Individual Financial Planning groups, with a focus on the implementation, maintenance, and development of retirement plans and client relationships. Ms. Rapp is an Accredited Investment Fiduciary® and has a BA from St. Lawrence University, where she studied Government and Economics.

Katherine Roy
Katherine Roy, CFP®, Managing Director, is Chief Retirement Strategist for J.P.Morgan Asset Management and Head of the Retirement Insights Strategy team. In this role, Ms. Roy leads the

development and delivery of retirement insights to financial professionals, plan sponsors and policymakers to improve retirement outcomes. Prior to joining the firm in 2011, Ms. Roy was Head of Personal Retirement Planning & Advice at Merrill Lynch where she led retirement planning solutions for wealth management clients, and the advice and guidance programs for plan participants in employer-provided benefit solutions. Ms. Roy received a B.A. from Yale University, and is a Certified Financial Planner®.

Jody Strakosch

Jody Strakosch founded Strakosch Retirement Strategies, LLC to bring investment and retirement solutions to the defined contribution market for asset management firms. Ms. Strakosch offers in-depth retirement market expertise, product development and strategic positioning to align with today's challenges for investment management and service providers seeking to enhance their profiles in the defined contribution/defined benefit marketplace. Ms. Strakosch is an active member of DCIIA (Defined Contribution Institutional Investment Association), on the Advisory Council of the Women's Institute for Secure Retirement (WISER), and a member of the Advisory Board for Institutional Investor's Journal of Retirement. Ms. Strakosch holds the Bachelor of Arts in Sociology from Wellesley College and the Master of Arts in Gerontology from the Davis School of Gerontology at the University of Southern California.

Patrice Willoughby

Patrice Willoughby is Managing Director and the Head of Diversity, Equity and Inclusion at Signal Group. Over two decades in the House, Executive Branch, and the private sector, Ms. Willoughby has solved problems and guided strategy in tax, financial services, and technology representing clients ranging from Fortune 100 to startups. Prior to joining Signal Group, she served in the Obama Administration and co-led the Technology and Financial Services practices at Invariant where she enhanced client engagement with minority caucuses and third parties. Ms. Willoughby earned a BA in Music from Case Western Reserve University, MA from the University of Cincinnati, and JD from the University of Wisconsin-Madison, after studying International Law in the Netherlands.