

Women's Institute for a Secure Retirement
An Intergenerational Perspective on Retirement Solutions

Annual iOme Challenge Forum
June 17, 2021
Agenda

- 1:30 – 1:40pm** **Welcome & Introduction**
Madeline Rapp, *Emcee* – Dimensional Fund Advisors
Cindy Hounsell, WISER President
Shawn Hausman, WISER Board Chair
- 1:40 – 1:50pm** **Keynote Welcome Speaker**
Senator Ben Cardin (D-MD)
- 1:50 – 3:00 pm** **Panel I – Changes in the Financial Industry: Key Areas**
Moderator: Jody Strakosch, Strakosch Retirement Strategies, LLC
Aaron Borders, Dimensional Fund Advisors & Warren Cormier, DCIIA Retirement Research Center - Setting the Stage/Change in the Industry: Emergency Funds, Financial Wellness
- Panel I – Lightning Round: Key Issue - Need to Know**
Moderator: Jeanne de Cervens, Project Director of the AgingWell Hub at the Business for Impact Center at Georgetown University McDonough School of Business
AgingWell Hub Report: Millennial & Gen Z Research – Lisa Margeson, Bank of America
Diversity & Inclusion: Nationwide Initiative – Cindy Hoes, Nationwide
Millennials and the Gig Workers – John Scott, The Pew Charitable Trusts
- 3:00 – 3:10pm** **Break**
- 3:10 – 3:40pm** **Panel II – 2021 iOme Challenge Winner**
Moderator: Jean Setzfand, AARP
iOme Challenge 2021 Winning Team: Heather Quach and Victor Li, University of Maryland, Baltimore County
- 3:40 – 4:10pm** **Panel III – Lightning Round: Improving the Retirement System**
Moderator: Jody Strakosch
Coverage, Auto IRAs and Saver's Credit: Catherine Reilly, Smart USA Co
Auto Portability: Spencer Williams, Retirement Clearinghouse – Update on 401(k)s Moving Forward
Student Loans: Snezana Zlatar, TIAA
- 4:10 – 4:30pm** **Keynote Speaker:** Ali Khawar, Deputy Assistant Secretary, EBSA
Introduction: Madeline Rapp, Dimensional Fund Advisors
- 4:30 – 4:50pm** **Congressional Panel - Conversation about Retirement Legislation**
Moderator: Shelly Eweka, TIAA; Panel: Kara Getz, House Committee on Ways and Means; Kendra Isaacson, Senate HELP Committee; Drew Crouch, Senate Finance Committee
- 4:50pm** **Wrap Up,** Madeline Rapp



2021 iOme Challenge Question

The 117th Congress has appointed you as a member of the 2021 Independent Commission on Retirement Security. Commissioners have been given this charge:

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 will help Americans plan and save for a more secure retirement.

Your job as a Gen Z'er about to enter the workforce is to bring a new perspective to the Independent Commission on Retirement Security and to 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 specific policies that will target the needs and challenges of specific population segments you believe the commission should prioritize.

To see the complete Challenge question and learn more about the iOme Challenge, visit: www.iomechallenge.org.

