

Women's Institute for a Secure Retirement
An Intergenerational Perspective on Retirement Solutions
Annual iOme College Challenge Forum
June 22, 2022

Agenda

- 2:00 – 2:05pm** **Welcome & Introduction**
Cindy Hounsell, WISER President
Alane Dent, WISER Strategic Advisor
- 2:05 – 2:15pm** **Welcome Keynote**
Representative Gwen Moore (D-WI) (Invited)
U.S. House of Representatives: Ways & Means Committee
- 2:15 – 2:55 pm** **Panel I – Setting the Stage for Gen Z & Millennials**
Moderator: Alane Dent
Anne Ollen, TIAA, Personal Finance Index-2022
Surya Kolluri, AgingWell Hub at Georgetown & Bank of America
- Lightening Round - Need to Know**
Renee Wilder Guerin - DCIIA Report
Mimi Joy, Financial Health Network
- 2:55 – 3:05pm** **Break**
- 3:05 – 3:15pm** **Afternoon Keynote: Intro to Crypto**
Ali Khawar, Deputy Assistant Secretary, EBSA, Department of Labor
- 3:15pm -3:50pm** **Panel II – Crypto Lightning Round**
Moderator: Lew Minsky, DCIIA, President & CEO
Aron Szapiro, Center for Retirement & Policy Studies, Morningstar
Michael Kreps, Groom Law Group
Michelle Muhammed, CFP, Edelman Financial Engines
- 3:50 – 4:30pm** **Panel III - iOme Challenge 2022 Winning Team, St Mary's College of Maryland**
Moderator: Michael Davis, T Rowe Price
Student Team: Mary Claire Basso-Luca, Jazlyn Benitez, Peter Fortescue,
Rachael Freeman and Kiya Rodriguez
Faculty Advisors: Josh Kaisen, Visiting Assistant Professor of Economics &
Jennifer J. Tickle, Associate Professor of Psychology
- The team was selected for their paper “A Proposal to the 117th Congress for the
Betterment of Retirement Savings.”**
- 4:30– 4:55pm** **Panel IV – Congressional Panel & Wrap-Up**
Moderator: Kathleen Coulombe, ACLI
Kendra Isaacson, Senate HELP Committee, Confirmed
Jamie Cummins, Senate Finance Committee (Invited)
Ron Storhaug, Office of Senator Ben Cardin (Invited)



2022 iOme Challenge Question

The 117th Congress Session 2 has appointed you as a member of the 2022 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.

