

## Women's Institute for a Secure Retirement

### *An Intergenerational Perspective on Retirement Solutions* Annual iOme College Challenge Forum

June 22, 2022

#### Agenda

- 2:00 – 2:10pm**      **Welcome & Introduction**  
Cindy Hounsell, WISER President  
Alane Dent, WISER Strategic Advisor
- 2:10 – 2:55 pm**      **Panel I – Setting the Stage for Gen Z & Millennials**  
*Moderator:* Amy Hinojosa, MANA – A National Latina Organization  
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 – Advantages of Fintech for Consumers
- 2:55 – 3:05pm**      **Afternoon Keynote: Intro to Crypto**  
Ali Khawar, Deputy Assistant Secretary, EBSA, Department of Labor
- 3:05 - 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 – 4:35pm**      **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 117<sup>th</sup> Congress for the  
Betterment of Retirement Savings.”**
- 4:35 – 5:00pm**      **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)  
Bob Blancato, Elder Justice Coalition (Invited)
- 5:00 – 7:00pm**      **Reception**  
9<sup>th</sup> Floor



---

## 2022 iOme Challenge Question

**The 117<sup>th</sup> Congress 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](http://www.iomechallenge.org).

