

***The Roadmap to Retirement Readiness:
Removing Roadblocks & Expanding Literacy***

A Symposium on Financial Solutions for Women

September 28, 2022

Agenda

- 1:00 - 1:10pm** **Welcome and Opening Remarks**
Cindy Hounsell, President, Women's Institute for a Secure Retirement (WISER)
Shawn Hausman, Board Chair, Women's Institute for a Secure Retirement (WISER)
- 1:10 – 1:25pm** **Opening Keynote:** Bill McInturff, Public Opinion Strategies
- 1:25 – 2:05pm** **Panel I - Improving Retirement Outcomes through Knowledge and Confidence**
Marlena Lee, Dimensional Fund Advisors
Sarah K. Charles, FORVIS Wealth Advisors
Rachel Weker, Retirement Plan Services, T. Rowe Price
Moderator: Aaron Borders, Dimensional Fund Advisors
- 2:05 – 2:45pm** **Panel II - Expanding Financial Literacy: Designing & Implementing Programs**
Lynne Ford, Intro to MissionSquare & Financial Wellness Programs
Josh Franzel, MissionSquare Research Institute
Dawn Cullen, MissionSquare Communication
Moderator: Amy Humphrey, Relationship Management – MissionSquare
- 2:45 – 2:55pm** **Break**
- 2:55 - 3:10pm** **Afternoon Keynote:** Kerry Hannon, Yahoo Finance & Author
Book Giveaway—*In Control At 50: How to Succeed in the New World of Work*
- 3:10– 3:50pm** **Panel III - Lightning Round: Aging Issues - Need to Know Costs & Resources**
Moderator: Anna Rappaport, S.O.A, Keeping Money Safe as You Age
Anthony Hinojosa, Financial Caregiving & Decisions – Compassion & Choices
Josh Hodges, Cost of Chronic Conditions, National Council on Aging
Aisha Williams, Benefits CheckUp, National Council on Aging
- 3:50 – 4:30pm** **Panel IV - Identifying Blockages & Finding Solutions**
Mary Beth Franklin, Social Security & Maximizing Benefits – Investment News
Lauryl Jackson, Paid Family Leave – ACLI
Kelli Hueler, Making Guaranteed Income Available – Hueler Income Solutions
Moderator: Anne Ollen, TIAA
- 4:30 – 5:00pm** **U.S. Senate Aging Committee – Madison Sloat**
Widows & Divorced Women, Supplemental Security Income
Consumer Financial Protection Bureau – Office of Older Americans
Deborah M. Royster, Debt Collection Practices
Moderator: Aliya Robinson, T. Rowe Price
- 5:00pm** **Wrap-up & Reception – Ninth Floor**