

2021 WISER Awards

Honoring Individuals Who Make a Difference

Susan Neely, President & CEO, American Council of Life Insurers

Susan K. Neely is a change maker with a track record of transforming industries, building consensus, and using bipartisan partnerships to revolutionize business and politics.

As President and CEO of the American Council of Life Insurers (ACLI), Neely leads an industry whose mission is to help families achieve financial security and certainty. ACLI's member companies represent 95 percent of industry assets and provide financial security products and services to 90 million families.

Neely forged groundbreaking tax and retirement security policy, including passage of the SECURE Act in 2019, the first retirement security legislation passed in a decade. Her leadership at ACLI launched the Economic Empowerment and Racial Equity Initiative to address systemic inequality and closing savings gaps.

Neely is recognized as one of the most influential people in association leadership. She received the "Luminary Award" from the Diversity & Flexibility Alliance for lifetime dedication to gender parity, diversity/inclusion. ★

Dimensional Fund Advisors

Founded in 1981, Dimensional has a history of applying academic research to practical investing. Dimensional is a leader in applying advanced financial science to equity and fixed income investment strategies. For more than 35 years, they have translated research into real-world investment solutions for clients. Their clients include financial advisors, pension funds, retirement plans, college savings plans, insurance companies, endowments and foundations, and sovereign wealth funds.

Dimensional is proud to work with WISER to highlight the unique financial challenges women face and explore solutions to improve long-term financial security for all. ★

Nancy LeaMond, Chief Advocacy & Engagement Officer/Executive Vice President, AARP

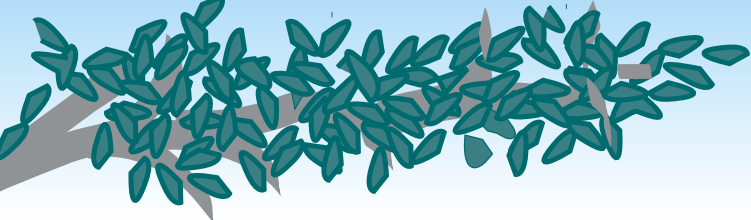
Nancy is responsible for advancing AARP's social mission on behalf of Americans age 50+ and their families. As the leading advocate for AARP's federal and state advocacy work, including government relations and public affairs campaigns. She oversees the public education programs, community engagement, volunteer efforts and multicultural outreach by directing a team of 700 staff members and more than 17,000 volunteers.

She leads a number of major AARP issue campaigns and initiatives including the family caregiver campaign:

- *Supporting Family Caregivers*: This multi-year campaign has secured passage of legislation including the federal RAISE Family Caregivers Act and the state-level CARE Act which is now law in 43 states. Other initiatives include development of resources like our Prepare to Care guide, promoting caregiver-friendly workplace policies and CAREversations that connect family caregivers to local resources and each other. ★

Amy Hinojosa, President & CEO of MANA, A National Latina Organization

Amy is the President and CEO of MANA, the oldest and largest Latina membership organization in the United States. Since 1974, MANA has been a leading voice for Latinas in the areas of health, financial well-being, education and technology access, environmental concerns, civil rights and diversity and inclusion. Amy serves on the Boards of the Hispanic Association on Corporate Responsibility, and the National Hispanic Leadership Agenda, and serves as Vice Chair of the Hispanic Technology and Telecommunications Partnership. Amy has been a *Huffington Post* and *Medium* Contributor and writes about issues impacting Latinas. A featured speaker at SXSW, The Aspen Institute, on Comcast Newsmakers, and conferences nationwide. ★



WISER Senior Fellow Awards

Dr. Laurel Beedon is a WISER Senior Research fellow and has spent her career working on retirement income policy as a researcher, writer, speaker, and educator. Dr. Beedon has recently retired from the Government Accountability Office (GAO) where she was a Senior Analyst in the Education, Workforce, and Income Security Division. Among her publications for the GAO are studies on the provision of home and community-based services and how the Social Security Administration delivers information to its constituents. ★

Cheryl Gannon is an expert on retirement, financial and health issues, and has worked for 25 years in a variety of public policy, public affairs and legislative positions. She is a Senior Fellow at WISER where for more than 20 years she has helped design numerous outreach and educational initiatives that provide critical financial education and fraud prevention skills to average and at-risk women. Since 2018 she has also directed WISER's iOme Challenge program, a national essay competition for college students. ★

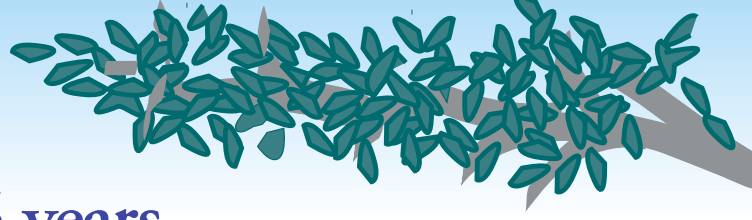
Judith Kozlowski is also a subject matter expert with the DOJ Elder Justice Initiative and a Senior Fellow at WISER. Previously, Ms. Kozlowski was a Senior Advisor to the HHS Assistant Secretary for Aging and the Administration on Community Living where she worked on national policy initiatives concerning elder abuse and financial exploitation. She also had a long career as a state and federal prosecutor. Ms. Kozlowski also helped establish the Office for the Financial Protection of Older Americans at the Consumer Financial Protection Bureau (CFPB). ★

Amy Shannon is a seasoned consultant with over 25 years' experience working to strengthen the retirement income security of workers, retirees and their families. Her work has included developing educational programs and materials while at the Pension Rights Center, the Older Women's League (OWL), the U.S. Department of Labor, and AARP. Ms. Shannon is a WISER Senior Fellow and currently serving her second term as Chair of the Leadership Council on Aging's Income Security Committee. ★

Linda K. Stone is an expert in retirement security issues and has worked to improve retirement solutions within the structure of employer sponsored plans as well as through education and advocacy on the individual level. Currently, Linda is the Senior Pension Fellow at the American Academy of Actuaries. In this role, she shapes and communicates the Academy's work on pension, Social Security, and other retirement security issues. She previously was a Managing Principal at an international Human Resource consulting firm. In her role as a WISER Senior Fellow, she is a frequent speaker and provided testimony to the Senate Special Committee on Aging hearing on Financial Security in Retirement. ★

Louis (Rusty) Toler is an independent consultant focusing on aging, disability, and communications issues. His federal career at the Social Security Administration included Director's Positions in the Office of Communications and Office of Disability. As a Senior Fellow at WISER, Mr. Toler represents WISER on the Leadership Council on Aging Organizations (LCAO) Community Services and Income Security Committees. He also serves as a member of the Task Force on Older Workers, convened by the National Academy of Social Insurance. ★

Senior Fellows are appointed by WISER and comprised of experts who have extensive experience and knowledge in key areas including financial and retirement planning, women's economic security, caregiving, Social Security and senior financial fraud and abuse. They contribute their time and talents to WISER by participating in presentations and workshops, engaging and collaborating with WISER's partners, and conducting research. WISER Fellows represent diverse backgrounds and add depth to WISER's outreach, materials, research, and programs.



25+ for 25 years

Beth Bell is currently Staff Director, Subcommittee on Select Revenue Measures for Chairman Neal and Chairman Thompson. Previously, she was Policy Director & Tax Counsel at the Senate Committee on Small Business and Entrepreneurship for Senator Cardin (D-MD).

Bill Benson was Staff Director Senate Labor Subcommittee on Aging, overseeing the successful reauthorization of the Older Americans Act (OAA) in 1992. That Act included the first federal law addressing issues of elder abuse and elder justice for Indian elders. Mr. Benson was Deputy Assistant Secretary for Aging at the Administration on Aging at the U.S. Department of Health and Human Services.

Bob Blancato dedicated 17 years on staff at the U.S. House Select Committee on Aging, became Executive Director of the 1995 White House Conference on Aging. He is Executive Director of the National Association of Nutrition and Aging Services Programs and National Coordinator of the Elder Justice Coalition, successfully advocating for \$86 million in Congressional funding to Adult Protective Services programs. He is President of Matz, Blancato and Associates

Charlie Bolton is an MBA Candidate at MIT Sloan School of Management. Previously, he was Staff Director of the U.S. Senate Subcommittee on Social Security, Pensions & Family Policy and a Legislative Assistant and Chief Economist for Senator Rob Portman.

Katie Campbell is the Legislative Director for Senator Mark Kelly. Ms. Campbell has considerable experience working on Capitol Hill and previously worked as Deputy Legislative Director for Senator Doug Jones (D-Ala).

Drew Crouch is Senior Tax and ERISA Counsel for Democratic Staff at the U.S. Senate Finance Committee. Previously, he was Staff Director & ERISA Counsel for the Oversight Subcommittee for the U.S. House of Representatives Committee on Ways and Means.

Alane Dent worked on Capitol Hill for 4 years for Congressman Earl Pomeroy. Next, she served as the Senior Vice-President for Federal Relations at the American Council of Life Insurers (ACLI). Ms. Dent is a nationally recognized advocate with over twenty years of experience strategically achieving legislative priorities. She is Founder and CEO of Dent Strategies, a boutique government relations firm specializing in federal and state advocacy.

Greg Dean is Senior Vice President of the Office of Government Affairs at FINRA. He worked on several committees during his 14+ years on Capitol Hill: Chief Counsel for 3 separate Senate Committees Banking, Housing & Urban Affairs, Health, Education, Labor & Pensions, and Budget Committees.

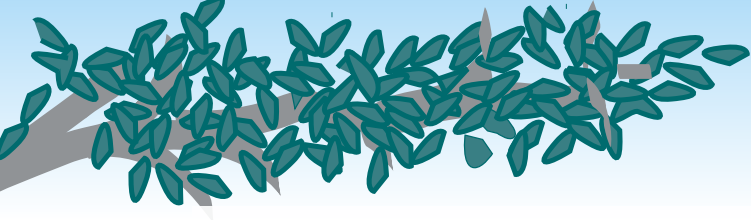
Kara Getz is Chief Counsel at U.S. House of Representatives Committee on Ways & Means. Ms. Getz has spent over fifteen years working on Capitol Hill in various roles such as Tax Counsel for the U.S. Senate Finance Committee and the Legislative Director and Tax Counsel for the Office of Congressman Richard Neal.

Alison Hard is a Staff member for the U.S. House of Representatives Education and Labor Committee. Ms. Hard serves as policy lead for child nutrition, the Older Americans Act, the Family Violence Prevention and Services Act, and other policy areas related to health and human services.

Diann Howland is VP Legislative Affairs at the American Benefits Council, a Washington DC based trade association. She has 25+ years of federal experience working on Senate HELP, Finance and Aging Committees; House Oversight Committee; & the Department of Labor.

Kendra Kosko Isaacson serves as Senior Pensions Counsel to the Senate Committee on Health, Education, Labor & Pensions, where she advises Chairwomen, Senator Patty Murray, and other members on ERISA and retirement issues. Kendra joined the HELP Committee after working in the Employee Benefits Security Administration at the Department of Labor's Office of Policy and Research.

Dave Koshgarian worked for more than two decades in Congress, including 15 years as Rep Ben Cardin's Chief of Staff on the House Ways and Means Committee. Mr. Koshgarian helped create the pension and retirement title of the Economic Growth and Tax reconciliation Relief Act of 2001. Currently, he is Executive Director at Ernst & Young LLP.



Michael Kreps is Principal, Co-Chair Retirement Services Practices for Groom Law Group. Previously, he served as Senior Pensions and Employment Counsel for the Senate Committee on Health, Education, Labor, and Pensions from the 110th through the 114th Congresses.

Brian Lindberg is an advocate, policy educator, and lobbyist. He provides public policy consultation and lobbying for several organizations including the National Association for Geriatric Education and the Special Needs Alliance and as public policy advisor to The Gerontological Society of America and WISER. Mr. Lindberg worked for ten years on the House Select Committee on Aging and the Senate Special Committee on Aging. As WISER's number one advocate for more than a decade, he has played critical roles educating policy makers about the needs of older women and financial capability and securing provisions in the Dodd Frank & Older Americans Act.

Kevin McDermott is the Senior Adviser for Labor Policy at the House Education and Labor Committee. He has over two decades of experience working on Capitol Hill for various Representatives and Committees.

Katherine Monge serves as Senior Policy Advisor to Speaker of the House, Nancy Pelosi. She advises the Speaker on tax, trade, Social Security, and pension issues. Ms. Monge has over a decade of experience working on Capitol Hill as a Policy Advisor.

Tommy Nguyen is currently working for the U.S. Senate Select Committee on Intelligence. He served as the Staff Director for Senator Johnny Isakson on the Senate Health, Education, Labor and Pensions (HELP) Committee's Subcommittee on Employment and Workplace Safety. He has worked on Capitol Hill for more than a decade.

Diane Oakley was Executive Director of the National Institute on Retirement Security, a non-profit and non-partisan organization, that develops research to help improve retirement prospects. Ms. Oakley worked on Capitol Hill under Representative Earl Pomeroy from 2004 to 2011.

Barbara Pate has been a Partner at Davis & Harman LLP since 2005 and represents clients on Tax and Benefits issues before Congress. Previously, Ms. Pate worked extensively on Capitol Hill, working for U.S. Representative Rob Portman and J.J. Pickle for over a decade.

Lori Prater is the Policy Director/Tax and Trade Counsel for the U.S. Congressman Mike Kelly in the U.S. House Ways and Means Committee. Ms. Prater has extensive experience on Capitol Hill with over two decades of work in various Congressional Offices and Committees.

Andy Remo is the Director of Federal & State Legislative Affairs at the American Retirement Association (ARA). Prior to his work at ARA, Mr. Remo worked for over five years with Senator Ben Cardin in various legislative roles.

Stacy Sanders is Staff Director for Senator and Chairman, Bob Casey on the U.S. Senate Special Committee on Aging. Previously, she was Federal Policy Director at Medicare Rights Center, ensuring affordable health care for older adults and people with disabilities.

Michael Sinacore is the Economic policy advisor at the Office of Senator Rob Portman. Mr. Sinacore was previously the Staff Director of the U.S. Subcommittee on Social Security, pensions, and Family Policy.

Ron Storhaug is the Senior Tax and Economic Policy Advisor for the Senate Committee on Small Business and Entrepreneurship for Senator Ben Cardin. Mr. Storhaug has worked extensively on Capitol Hill in various offices and committees for 10 + years.

Patrice Willoughby is the Managing Director at Signal group. She also serves on the Board of the Women's Institute for a Secure Retirement (WISER). Ms. Willoughby was recognized as a "Top Lobbyist and Influencer" in the 2020 "Lawyers of Color" publication. She also spent a decade on Capitol Hill working for Representative Stephanie Tubbs Jones and Representative Barbara Lee.