



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

June 20, 2023

Agenda

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| 1:15 – 1:25pm | Welcome & Introductions
Cindy Hounsell, WISER President
Shawn Hausman, WISER Board Chair
Alane Dent, WISER Strategic Advisor and Emcee |
| 1:25 – 2:15pm | Opening Panel - <i>Setting the Stage – Research & Changes in the Financial Industry</i>
Moderator: Aliya Robinson, T. Rowe Price
Young Adults, Their Attitudes & Outlook Toward the Future - Emily Watson, TIAA Institute
Creating Racially Equitable Savings Outcomes - Jack VanDerhei, Morningstar
I Can Retire – Vidhi Sander, Capital Group/ Home of American Funds |
| 2:15 – 2:45pm | Lightening Round - <i>Advantages of Fintech: Start-ups help in 2 Key Areas</i>
Moderator: Elizabeth McCluskey, TruStage Ventures
Caribou Wealth, Christine Simone – Healthcare
Sunny Day Fund, Sid Pailla - Workplace Emergency Savings |
| 2:45 – 3:00pm | Break |
| 3:00 – 3:25pm | Keynote Speaker: Ali Khawar, Deputy Assistant Secretary, U.S. Department of Labor – EBSA
Cybersecurity |
| 3:25 – 4:10pm | Panel II – <i>2023 iOme Challenge Winner</i>
Moderator: Evan Avila, 2018 iOme Challenge Winner and Lew Minsky, DCIA
2023 iOme Challenge Winning Team:
Benjamin Ault (team leader) and Hans-Jacob Larsen Nesheim, UMBC
Faculty Advisor: Douglas Lamdin |
| 4:10 – 4:40pm | Lightning Round: <i>Key Need to Know Issues – Gen Z & The Truth About Social Security</i>
Moderator: William Arnone, National Academy of Social Insurance
NASI Summer Interns discuss the Nation's Foundational Retirement System
Ariella Jailal, Ori Ben Ari, and Taylor Reilly |
| 4:40 – 5:10pm | Congressional Panel – <i>A Conversation</i>
Moderator: Sarah Pierce, Paychex
Kendra Isaacson, Senator Patty Murray's Office
Kara Getz, House Committee on Ways and Means – Auto-IRAS
Michael Sinacore, Senate HELP Committee (Invited) |
| 5:10 – 5:15pm | Wrap Up, Alane Dent |
| 5:15pm | Reception, Networking and Special Guest – 9th Floor
Assistant Secretary Lisa Gomez, U.S. Department of Labor, EBSA |

2023 iOme Challenge Question

The 118th Congress has appointed you as a member of the 2023 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 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