Women & Retirement: Improving the Pathways Forward

A Symposium on Financial Solutions for Women

October 4, 2023
1:00pm – 5:30pm

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 – 1:30pm  Keynote: SBA Administrator Isabella Casillas Guzman – Pres. Biden Cabinet Member
Represents 33 million small businesses (INVITED)
Introduction: Judy Chapa, Latina Project Advisor

1:30 – 2:00pm  Panel I: Research: Building Women’s Financial Health at Older Ages
Cindy Cox-Roman, Insights on Financial Education, HelpAge-USA
Beth Almeida, Latinas & Financial Literacy Success
Moderator: Amy Hinojosa, MANA – A National Latina Organization

2:00 – 2:30pm  What Women Say: “Insights & Policy Solutions for Lifelong Financial Security”
Bill McInturff, Polling from Public Opinion Strategies/Lake Research

2:30 – 3:20pm  Panel II Research: Why Women Are Worried?
Catherine Collinson, Savers Credit/Savers Match, Transamerica Institute
Sudipto Banerjee, Closing the 401(k) Gender Savings Gap, T. Rowe Price
Michael Kreps, Retirement Account Disparities Increased & Persisted, Groom Law Group
Moderator: Kerry Hannon, Author & Senior Columnist for Yahoo Finance

3:20 – 3:40pm  BREAK

3:40 – 4:30pm  Lightning Round: Identifying Pathways Forward & Finding Solutions
KC Boas, BlackRock Retirement Group – Retirement Income & BPC research
Katie Selenski, DCIIA – State IRA Savings Programs & Inclusion Efforts
Aaron Klein, Brookings Institute - Developing a Financial Regulatory Reform Initiative for Workers
Moderator: Mary Beth Franklin, Investment News

4:30 – 5:30pm  Panel III: Finding Pathways & Policy Solutions
Jen Brown, Banking Counsel Senate Majority Leader Chuck Schumer (Social Security)
Howard Bedlin, Leadership Council on Aging (NCOA Policy)
Kara Getz, House Ways & Means Committee (Access to Retirement Accounts)
Chris Spence, TIAA (Retirement Crisis--Bill of Rights Campaign)
Robert Blancato, Elder Justice Coalition (Financial Fraud issues)
Moderator: Brian Lindberg, Healthsperien

5:30pm  Wrap-up & Reception – Ninth Floor