



Annual Women's Retirement Symposium
Women & Retirement: Improving the Pathways Forward

October 4, 2023
Speaker Bios

Beth Almeida

Beth Almeida is a Senior Fellow at American Progress and Principal at Cove Research. Beth's research focuses on women's economic security, aging and retirement, and the labor market. Her research findings have been cited by the Biden White House in support of its economic policies; presented in testimony before the U.S. Congress, federal agencies, and state legislatures; and covered in national and trade media. Previously, Beth served as principal researcher at the Center on Aging at the American Institutes for Research, one of the world's largest behavioral and social science research and evaluation organizations. Prior to that, she served as the executive director of the National Institute on Retirement Security and as a senior economist with the International Association of Machinists and Aerospace Workers. She has served by appointment by the U.S. secretary of labor to the ERISA Advisory Council and the Bureau of Labor Statistics' Labor Research Advisory Council. She holds a master's degree in economics from the University of Massachusetts Amherst and a bachelor's degree from Lehigh University.

Sudipto Banerjee

Sudipto Banerjee is the director of Retirement Thought Leadership in the Investment Product and Retirement Content Group at T. Rowe Price. He is a vice president of T. Rowe Price Associates, Inc. Sudipto has been with T. Rowe Price since 2018, beginning in Retirement Plan Services. Prior to this, he was employed by Employee Benefit Research Institute. Sudipto earned a B.S. in economics from Presidency College, India; an M.S. in economics from the Indian Statistical Institute; and a Ph.D. in economics from Ohio State University. In 2015, Next Avenue named Sudipto one of the "50 Influencers in Aging" for his analysis of the economic aspects of retirement.

Howard Bedlin

Howard Bedlin is the Government Relations and Advocacy Principle at the National Council on Aging (NCOA). He is responsible for all of NCOA's federal and state legislative advocacy efforts on issues and programs of concern to older adults, which include the Older Americans Act, Medicare, Medicaid, long-term care, income security, and community services programs.

Robert “Bob” Blancato

Robert “Bob” Blancato is the National Coordinator of the bipartisan 3000-member Elder Justice Coalition. He is also President of Matz, Blancato and Associates, the Executive Director of the National Association of Nutrition and Aging Services Programs, and the National Coordinator of the Defeat Malnutrition Today coalition. Bob has long been recognized as a national advocate with policy expertise on behalf of older adults. In 2019, he was invited by both the Senate Finance Committee and House Ways and Means Committee to testify on a range of issues. He also testified in 2022 before the House Appropriations Labor-HHS-Education Subcommittee. Bob’s prior work history includes 17 years as a staffer in Congress and an appointment by President Clinton to be the Executive Director of the 1995 White House Conference on Aging, one of four he has participated in. He is a member of the Senior Executive Service. As a volunteer, he currently serves on the National Board of AARP and the board of the National Hispanic Council on Aging. In 2019, Bob began a four-year term on the National Advisory Committee on Rural Health and Human Services, appointed by HHS Secretary Azar. Bob holds a BA from Georgetown University and an MPA from American University. Bob has won numerous awards for advocacy, most recently the American Society for Aging’s ASA Hall of Fame Award awarded in April 2021.

KC Boas

KC Boas co-founded the Women in Retirement Group in her department at BlackRock, which focuses on career development and community building for its members. She leads programming across five offices, alongside a team that seeks to strengthen male allyship and gender diversity across the business. KC is also the Global Strategy Manager for BlackRock’s Women’s Network, and spearheaded a global campaign for International Women’s Day where she engaged thousands of employees across 63 offices in a gender equity pledge. Last year, she was asked to join the firm’s Global Mosaic Leadership Team as an inaugural member – working in concert with BlackRock’s Inclusion & Diversity Team to cultivate and advance diversity, equity and inclusion at the firm and in the communities in which it operates. Outside BlackRock, KC is an ambassador for Girls Who Invest and an associate board member for the Council for Economic Education.

Jen Brown

Jen Brown currently served as the Banking Counsel to Leader Chuck Schumer. Her portfolio includes all banking, economic, insurance, labor, and education issues. Prior to joining the Leader’s office, she served as the Tax and Education Counsel for a member of the Senate Finance Committee. Prior to joining the US Senate, Jen held positions with the US House of Representatives, UnidosUS, the National Institute on Retirement Security, and the US Department of Labor.

Hon. Judy Chapa

Judy Chapa is a long-time leader in the financial services world. Currently she is President of Chapa Consulting, a marketing, public relations, and advocacy firm, where she works with clients on strategic marketing, communications, and government relations. Prior to Chapa Consulting she was Vice

President of Corporate Social Responsibility (CSR) for the Financial Services Roundtable (FSR), where she oversaw the CSR department which highlighted FSR member companies' efforts to improve communities, with a focus on financial literacy, and strengthening partnerships with non-profit partners and public policymakers. She also served as President of the Financial Services Roundtable Scholarship Foundation and Board member for the FSR Foundation. Ms. Chapa was appointed by President George W. Bush in 2002 as the first Deputy Assistant Secretary for the U.S. Department of the Treasury's Office of Financial Education. She is responsible for establishing the office and developing the Treasury Department's financial education policy to promote financial democracy.

Catherine Collinson

Catherine Collinson is CEO and president of nonprofit Transamerica Institute and Transamerica Center for Retirement Studies. Catherine is a retirement and market trends expert and champion for Americans who are at risk of not achieving a financially secure retirement. She oversees all research and outreach initiatives, including the Annual Transamerica Retirement Survey. With more than two decades of experience, Catherine is a nationally recognized voice on retirement trends. Catherine is regularly cited by top media outlets on aging and retirement-related topics, speaks at industry conferences, and authors articles in leading industry journals. She has testified before Congress on matters related to employer-sponsored retirement plans among small business, which have featured the need to raise awareness of the Saver's Credit among those who would benefit most from the important tax credit. She co-hosts ClearPath: Your Roadmap to Health and WealthSM podcast on WYPR, Baltimore's NPR news station.

Cindy Cox-Roman

Cindy Cox-Roman is the President and CEO of HelpAge USA. She previously served as HelpAge USA's board chair, as well as board chair of HelpAge International in London. Cindy has spent her career in the fields of strategic research, communication, and aging. Previously, she served as CEO of WIT Consulting LLC, a market research firm with a specialty in bringing the voice of older people to the design of policies, products/services, and communications. Prior to WIT Consulting, Cindy was a partner at Yankelovich Partners, the social trend research firm, and a vice president at Y&R, the global ad agency. She has a B.S. from the School of Foreign Service at Georgetown University and M.A. in gerontology from the University of Southern California.

Mary Beth Franklin

Mary Beth Franklin is a Contributing Editor at Investment News specializing in Social Security, Medicare and Retirement income. She has been a financial journalist for more than 40 years, covering everything from federal budget and tax policies as a Capitol Hill reporter for United Press International to consumer finances as a writer and editor at Kiplinger's Personal Finance magazine. Mary Beth became a Certified Financial Planner in 2015 and is an in-demand speaker at conferences for financial professionals as well as a frequent guest on numerous radio and television programs. She is the author of "Maximizing Your Social Security Retirement Benefits" and host of the Retirement Repair Shop

podcast. In her free time, Mary Beth likes to read, garden, ski and play the piano. She received a BA in Communications from American University in 1975 where she continues to mentor journalism students.

Kara Getz

Kara Getz is Chief Counsel for Democrats on the Ways and Means Committee. Before taking on the role in February 2017, Getz served as Senior Tax Counsel and Tax Counsel for the Senate Finance Committee since 2013, working for Senators Ron Wyden (D-OR) and Max Baucus (D-MT). Prior to joining the Senate Finance Committee, she served as Tax Counsel and Legislative Director for Representative Richard Neal (D-MA). Prior to joining Rep. Neal's office, she served as Chief Counsel for the Senate Special Committee on Aging for Chairman Herb Kohl (D-WI). Before that, she served as Tax Counsel for Senator Gordon Smith (R-OR). Getz also has experience in the private sector. Getz earned her B.A. in History from Dickinson College and her J.D. from Duquesne University.

Hon. Christina Hale

Christina Hale serves as Assistant Administrator for the Office of Women's Business Ownership at the U.S. Small Business Administration. Prior to this role, she served as the Associate Administrator for the Office of Communications and Public Liaison (OCPL), where she provided executive leadership and direction to OCPL operations and nationwide programs. She has more than 20 years of executive experience working with business leaders in government and civil society. Before joining the SBA, she served as Head of Communications at the U.S. International Development Finance Corporation, where she oversaw the Agency's strategic communications, including planning, development, and implementation. In 2012, she was elected to serve in the Indiana General Assembly, where she worked with a focus on supporting the success of employers, the workforce, and the economy. She has led teams, projects, and offices throughout the United States and several countries in Europe and Asia-Pacific. Ms. Hale was a Rotary International Ambassadorial Scholar and graduated from Purdue University.

Kerry Hannon

Kerry Hannon is a workplace futurist and strategist on career transitions, entrepreneurship, personal finance and retirement. She is a frequent TV, radio and podcast commentator and is a sought-after keynote speaker. Kerry is currently a senior columnist for Yahoo Finance and an on-air expert. She was formerly an expert columnist, opinion writer and regular contributor to The New York Times, MarketWatch, Forbes, and a personal finance and entrepreneurship expert on the PBS website NextAvenue.org. Millions of viewers, readers and listeners have been motivated by Kerry's can-do, down-to-earth message. She has appeared as a career and financial expert on The Dr. Phil Show ABC, CBS, CNBC, NBC Nightly News, NPR, Yahoo Finance and PBS. Kerry has dedicated her work to making a difference in people's lives, to give them confidence and the tools to succeed personally, professionally, and financially. She offers her audiences and readers can-do expert advice on the best ways to empower themselves now and for the future.

Shawn Hausman

Shawn Hausman is Chair of the Women's Institute for Secure Retirement (WISER) Board of Directors. She has over 35 years of experience as a public affairs and communications professional. Ms. Hausman retired from the American Council on Life Insurers, where she served many years as Senior Vice President, Public Affairs. As a member of senior management, she directed all aspects of the association's communications strategies on federal and state issues. This included overseeing major advocacy campaigns on tax and retirement security issues that encompassed message development and research; media and advertising on traditional and digital platforms; and grassroots outreach and coalition building.

Amy Hinojosa

Amy Hinojosa is the President and CEO of MANA, A National Latina Organization, the oldest and largest Latina membership organization in the United States. She is responsible for the operations and oversees the educational programming of the national organization, as well as national advocacy efforts. MANA focuses on leadership, advocacy and community service through educational programming for adults in the areas of financial literacy, professional development and mentor training. The signature MANA HERMANITAS® program is the only national mentoring program specifically designed for Latina youth in the country. Amy has served in different capacities throughout the MANA organization, starting in 2007, including Director of National Programs, Vice President of Leadership Initiatives, and Executive Director. Prior to returning to MANA in 2013, she served as Executive Director of the National Association of Hispanic Publications, Inc. (NAHP), NAHP Media LLC, and the National Hispanic Press Foundation (NHPF), based in Washington, DC. Amy has extensive experience working on local and national grassroots campaigns targeted at mobilizing voices and actions in Hispanic communities nationwide on topics ranging from financial literacy and retirement, mentoring, data privacy, civic engagement, and census participation to advocacy efforts on student loans, immigration reform and health care reform.

Cindy Hounsell

Cindy Hounsell is the President and Founder of the Washington D.C. based Women's Institute for a Secure Retirement (WISER) a nonprofit founded in 1996 to improve opportunities for women to secure retirement income and to educate the public about the inequities that disadvantage women in retirement. As an attorney and retirement expert, Ms. Hounsell has been widely quoted in various media and publications including The New York Times, The Wall Street Journal, Forbes/PBS Next Avenue, Barrons, U.S. News and World Report, ABC, CNN, CNBC MarketWatch, Yahoo Finance and NPR's 1A, All Things Considered, Morning Edition, and Marketplace. Ms. Hounsell is also Director of the National Resource Center on Women and Retirement in partnership with the U.S. Administration on Community Living's U.S. Administration on Aging. Through the Center's work, Ms. Hounsell provides technical assistance to national aging organizations, trains leaders and grassroots advocates. Ms. Hounsell has testified before Congress and attended as a delegate for several White House summits and conferences. She has authored many chapters, columns, articles, op-eds,

papers, guides and booklets focused on women's retirement issues. Awards include a lifetime achievement award by the Plan Sponsor Council of America, an Influencer in Aging award by PBS-Next Avenue, Money magazine's 40 Money Heroes, the National Adult Protective Services Association and the MANA Award from MANA, A National Latina Organization. Most recently, the American Society on Aging honored Ms. Hounsell & WISER with the 2023 Advancing Economic Security for Older Adults Award.

Aaron Klein

Aaron Klein is Miriam K. Carliner Chair and senior fellow in Economic Studies at the Brookings Institution, focused on financial technology and regulation; payments; macroeconomics; and infrastructure finance and policy. Prior to joining Brookings in 2016, he directed the Bipartisan Policy Center's Financial Regulatory Reform Initiative. Between 2009 and 2012, Klein served as the deputy assistant secretary for economic policy at the Department of Treasury. He worked on financial regulatory reform issues including crafting and helping secure passage of the Dodd-Frank Wall Street Reform and Consumer Protection Act of 2010. He also played leading roles on responding to the economic crisis, housing finance reform, transportation and infrastructure policy, and Native American policy. Previously, Klein served as chief economist of the Senate Banking, Housing and Urban Affairs Committee for Chairmen Chris Dodd and Paul Sarbanes.

Michael Kreps

Michael Kreps is chair of Groom's Retirement Services group, and he works with a wide variety of clients on complex retirement and health plan issues. His firsthand experience with the legislative and regulatory process gives him a perspective that is often instrumental in helping clients develop and implement effective compliance and advocacy strategies. From the 111th through the 114th Congresses, Michael served as the Senior Pensions and Employment Counsel for the U.S. Senate Committee on Health, Education, Labor, and Pensions.

Brian Lindberg

Brian W. Lindberg is a Washington, DC-based advocate, policy educator, and lobbyist. He serves as a public policy advisor to aging, health care, and special needs advocacy organizations. Currently he is Vice President, Health and Aging Policy at Healthspieren, a policy and health care consulting firm focused on strategic, regulatory, legislative, and implementation issues. Brian helped create the Consumer Coalition for Quality Health Care in 1993, which continues to advocate for health care system reform that provides meaningful consumer information, strong due process protections, a consumer advocate program, and a system for independent quality oversight. He also worked in Congress for 10 years, including serving as staff director of the House Select Committee on Aging's Subcommittee on Housing and Consumer Interests, and prior to that on the Senate Special Committee on Aging. Mr. Lindberg holds a Master's in the Management of Human Services from the Florence Heller Graduate School at Brandeis University, a Bachelor of Social Work from Temple University, and studied health and human services at the University of Stockholm's International Graduate School.

Bill McInturff

Bill McInturff is a partner of Public Opinion Strategies, one of the nation's largest political and public affairs survey research firms. Over a more than 30-year career in survey research and over 5,000 projects, he has been devoted to what he describes as "combat message development," not simply monitoring public opinion, but developing messages to defend and promote client interests on complex public policy issues. The focus of much of Bill's work has been health care, with the firm having conducted over 1700 focus groups and more than 1300 surveys for health care stakeholders and about health care policy.

Katie Selenski

Katie Selenski is a Senior Advisor with the Defined Contribution Institutional Investment Association. She is the former founding Executive Director of CalSavers, the State of California's pioneering retirement savings program that provides a path to retirement security for Californians who lack access to a retirement plan at work. Prior to taking the helm at CalSavers, she was the State Policy Director for pension policy at The Pew Charitable Trusts in Washington, D.C., where she advised policymakers in a dozen states and cities. Previously, she was a senior manager with the nonpartisan public sector consulting firm Harvey M. Rose Associates, where she advised municipal leaders on a wide array of budget, management, and policy matters, including pensions. She is a member of the advisory board of the Aspen Institute's Leadership Forum on Retirement Savings, a frequent speaker on retirement savings, and has been quoted by dozens of national media outlets.

Chris Spence

Chris Spence's career with TIAA spans over 22 years during which he's had several roles including financial advisor, policy analyst, lobbyist and most recently head of Federal Government Relations. Chris initially served as a financial advisor, working with TIAA clients to develop sound strategies to help them achieve their long-term financial goals. After eight years in this role, Chris joined TIAA's Government Relations team as a policy analyst, using his experience as an advisor to assist in the development of enterprise-wide policy positions while opening lines of communication with business leaders throughout the company. After several years, he transitioned into lobbying federal policy makers on the importance of enhancing retirement security for all Americans. Chris' proudest and most notable achievement during this time was the passage of the SECURE Act, the first comprehensive retirement reform enacted in more than a decade. Chris currently leads TIAA's Federal Government Relations team, which is responsible for developing policy and advocating on behalf of TIAA, Nuveen and TIAA Bank. He continues to educate lawmakers and regulators about policies that would impact Americans' financial well-being, while keeping internal and external stakeholders apprised of developments in Washington, DC.