

## **Women & Retirement: Improving the Pathways Forward**

### *Annual Women's Retirement Symposium*

**October 4, 2023**

#### **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**      **Keynote: Hon. Christina Hale**, Associate Administrator for the Office of Women's Business Ownership U.S. Small Business Administration  
*Introduction: Judy Chapa, Former Deputy Assistant Secretary for the Treasury, Office of Financial Education*
- 1:25 – 2:10pm**      **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, Cove Research  
Judy Chapa, Latina Project Advisor, Chapa Consulting  
*Moderator: Amy Hinojosa, MANA – A National Latina Organization*
- 2:10 – 2:25pm**      **What Women Say: Insights & Policy Solutions for Lifelong Financial Security**  
Bill McInturff, Polling from Public Opinion Strategies/Lake Research
- 2:25 – 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)  
Bob Blancato, Elder Justice Coalition (Financial Fraud issues)  
*Moderator: Brian Lindberg, Healthsperien*
- 5:30pm**              **Wrap-up & Reception – Ninth Floor**