

*An Intergenerational Perspective on Retirement Solutions*

**Annual iOme Challenge Forum**

**with support from TIAA Institute**

101 Constitution Ave NW, 7<sup>th</sup> Floor, Washington DC

**June 20, 2024**

**Agenda**

- 1:00 – 1:10pm ET**      **Welcome & Introductions**  
Cindy Hounsell, WISER President  
Shawn Hausman, WISER Board Chair  
Alane Dent, WISER Strategic Advisor and Emcee
- 1:10 – 1:40pm**      **Lightening Round – Advantages & Impact of FinTech Start-ups**  
*Moderator:* Elizabeth McCluskey, TruStage Ventures: Director, Discovery Fund  
Debbie's Mission (Joindebbie.com): Frida Leibowitz, CEO & Founder  
Uprise: Jessica Chen Riolfi, Co-Founder & CEO  
Starlight: Catherine Xu, Co-Founder
- 1:40 – 2:20pm**      **Panel 1: *Upcoming Trends & Changes in the Financial Industry***  
Sue Walton, Capital Group (Plan Sponsor Report)  
Spencer Williams, Retirement Clearinghouse (Saver's Match)  
Jack VanDerhei, Morningstar (Aspen, DCIAA & Morningstar report on Saver's Match)
- 2:20 – 3:00pm**      **Panel II: 2024 iOme Challenge Winner: Johns Hopkins Carey Business School**  
*Moderators:* Shelly Eweka, TIAA Institute & Evan Avila, 2018 iOme Challenge Winner  
Team Members: Xenia Afoakwah, Emmanuel Animashaun, Di Han, Deanna Portero,  
Roy Randen, and Cira Sun  
Faculty Advisor: Xian Sun attending for Dr. Phillip Phan, Ph.D.
- 3:00 – 3:15pm**      **Break**
- 3:15 – 3:35pm**      **Keynote Speaker**  
Ali Khawar, Deputy Assistant Secretary, U.S. Department of Labor – EBSA  
Emergency Funds & Financial Wellness
- 3:35 – 4:15pm**      **Panel III: 2024 iOme Challenge Winner: University of Maryland, Baltimore County**  
*Moderator:* Shelly Eweka, TIAA Institute & Evan Avila, 2018 iOme Challenge Winner  
Team: Peter Wilschke, Arvind Kuruvilla, and Matthew Dyson  
Faculty Advisor: Douglas Lamdin
- 4:15 – 4:40pm**      **Lightning Round - Gen Z Talking About Social Security**  
*Moderator:* Shaun O'Brien, Policy Director, AFSCME  
NASI Summer Interns discuss the nation's foundational retirement system
- 4:40 – 5:10pm**      **Government Affairs Panel – A Conversation**  
Kendra Isaacson, Mindset dc  
Kara Getz, House Committee on Ways and Means (Auto-IRAs)  
Michael Sinacore, Senate HELP Committee (Invited)
- 5:10 – 5:15pm**      **Wrap Up, Alane Dent**
- 5:15 – 7:00pm**      **Reception - Ninth Floor**

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## 2024 iOme Challenge Question

**The 118<sup>th</sup> Congress has appointed you as a member of the 2024 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 learn more about the iOme Challenge, visit: [www.iomechallenge.org](http://www.iomechallenge.org)