1:00 – 1:10pm 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
Moderator: 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 Isaacs, Mindsetdc
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
2024 iOme Challenge Question

The 118th 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