### Wednesday, July 15, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Topics and Speakers</th>
</tr>
</thead>
</table>
| 11:00 am – 12:00 pm ET | **Opening Remarks**  
  John Geli, SS&C Technologies  
  U.S. Representative Phil Roe, M.D. (R-TN)  
  **Insights from the Regulators on Recent Guidance**  
  Melissa Kahn, State Street Global Advisors (Moderator)  
  Joe Canary, U.S. Department of Labor  
  Pamela Kinard, Internal Revenue Service, Office of Chief Counsel  
  Ron Rutherford-Triche, Internal Revenue Service, Office of Chief Counsel  
  Stephen Tackney, Internal Revenue Service, Office of Chief Counsel  
  Jeff Turner, U.S. Department of Labor |
| 12:00 pm – 12:30 pm ET | **BREAK**                                                                         |
| 12:30 pm – 1:20 pm ET | **Update from the Hill**  
  Chris Gaston, Davis & Harman (Moderator)  
  Charlie Bolton, U.S. Senator Rob Portman (R-OH)  
  Vic Goetz, U.S. Representative Brad Schneider (D-IL)  
  Lori Prater, U.S. Representative Mike Kelly (R-PA)  
  Kevin McDermott, House Committee on Education and Labor |

### Wednesday, July 22, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Topics and Speakers</th>
</tr>
</thead>
</table>
| 11:00 am – 12:00 pm ET | **Opening Remarks**  
  Mary Beth Glotzbach, Franklin Templeton  
  U.S. Senator Ben Cardin (D-MD)  
  **PEPs/MEPs: What’s Next**  
  Michael Davis, T. Rowe Price (Moderator)  
  Randy Long, SageView Advisory Group  
  Chantel Sheaks, U.S. Chamber of Commerce  
  Joe Smolen, Empower Retirement |
<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>12:00 pm – 12:30 pm ET</td>
<td><strong>BREAK</strong></td>
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</tbody>
</table>
| 12:30 pm – 1:20 pm ET | **Universal Workplace Savings Plans**  
Kevin Cox, Ascensus (Moderator)  
Alex Mazer, Common Wealth  
Darren Philp, Smart Pension  
Kirby Rappell, SuperRatings, AUS  
Katie Selenski, CalSavers |
| 1:30 pm – 2:20 pm ET | **CONCURRENT BREAKOUTS**  
**Using Alternatives in DC Plans**  
Bill Ryan, Aon (Moderator)  
Jonathan Epstein, DCALTA  
Charles Nelson, Voya Financial  
Sara Shean, PGIM Real Estate and Co-President DCREC  
Kevin Walsh, Groom Law Group  
**Deep Dive on SECURE – Open Questions on Key Operational Aspects**  
Chris Robino, SS&C Technologies (Moderator)  
Michael Hadley, Davis & Harman  
Rachel Kugelmass, Conduent  
Rod Stortenbecker, Lincoln Financial Group |

**Wednesday, July 29, 2020**

<table>
<thead>
<tr>
<th>Time</th>
<th>Topics and Speakers</th>
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</table>
| 11:00 am – 12:00 pm ET | **Opening Remarks**  
Melissa Kahn, State Street Global Advisors  
U.S. Representative Bobby Scott (D-VA)  
**Pensions and the Aftermath of the Coronavirus Crisis**  
Charles Millard, Amundi Pioneer (Moderator)  
Pablo Antolin, OECD  
Keith Brainard, NASRA  
David Draine, The Pew Charitable Trusts |
| 12:00 pm – 12:30 pm ET | **BREAK**                                                                            |
| 12:30 pm – 1:20 pm ET | **How the World Saves: The Evolution in Global DC Systems**  
Debra Whitman, AARP (Moderator)  
Gustavo Demarco, The World Bank  
Richard Magner, Infosys McCamish Systems  
Steve Utkus, Vanguard |
### Wednesday, August 5, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Topics and Speakers</th>
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| 11:00 am – 12:00 pm ET | **Opening Remarks**  
Rob Scheinerman, AIG Retirement Services  
**Financial Wellness: Priorities and Challenges**  
Jessica Sclafani, MFS Investment Management (Moderator)  
Karen Andres, The Aspen Institute  
Cindy Hounsell, WISER  
Elizabeth Mulholland, Prosper Canada  
Marlon Sullivan, Abbott |
| 12:00 pm – 12:30 pm ET | BREAK |
| 12:30 pm – 1:20 pm ET | **Engaging Participants Post Crisis**  
Allie Shafer, SS&C Technologies (Moderator)  
Warren Cormier, DCIIA  
Alicia Hartjen, SS&C Technologies  
Megan Yost, Segal Benz |
| 1:30 pm – 2:20 pm ET | **CONCURRENT BREAKOUTS**  
**Data Privacy in Retirement: An Inflection Point?**  
Cindy Volker, Broadridge Financial Solutions (Moderator)  
Kendra Isaacson, U.S. Senator Patty Murray (D-WA)  
David Levine, Groom Law Group  
**Industry Roundtable Discussion on Lifetime Income Disclosures**  
Denise Gumlak, Enterprise Iron Financial Industry Solutions (Facilitator) |

### Wednesday, August 12, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Topics and Speakers</th>
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| 11:00 am – 12:00 pm ET | **Opening Remarks**  
Tim Rouse, The SPARK Institute  
**Recent Plan Litigation: Key Takeaways for Fiduciaries**  
Mike Raso, PineBridge Investments (Moderator)  
DeMario Carswell, Goodwin  
Tom Clark, The Wagner Law Group |
<table>
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<tr>
<td>11:00 am – 12:00 pm ET</td>
<td><strong>Opening Remarks</strong> Peg Knox, DCIIA</td>
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<tr>
<td></td>
<td><strong>Global Aging and Lifetime Income: How Should Global DC Systems Cope?</strong></td>
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<td>Jody Strakosch, Strakosch Retirement Strategies, LLC (Moderator)</td>
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<td>Dr. Abigail Hurwitz, The Hebrew University of Jerusalem</td>
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<td>Per U.K. Linnemann, Linnemann Actuarial Consulting ApS</td>
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<td>Tim Pitney, TIAA</td>
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<td>Mark Rowlands, NEST Corporation</td>
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<td>12:00 pm – 12:30 pm ET</td>
<td><strong>BREAK</strong></td>
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</table>
### 12:30 pm – 1:20 pm ET

**Will Europe Embrace DC Savings?**
John Mitchem, JM3 Projects (Moderator)
Simon Colboc, FECIF European Pensions Institute
Christian Lemaire, Amundi
Ziga Vizintin, Slovenia

### 1:30 pm – 2:20 pm ET

**CONCURRENT BREAKOUTS**

<table>
<thead>
<tr>
<th>Role of the Employer in DC Plans</th>
<th>Fraud Prevention</th>
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</thead>
<tbody>
<tr>
<td>Aron Szapiro, Morningstar (Moderator)</td>
<td>Doug Peterson, Empower Retirement (Moderator)</td>
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<td>Josh Cohen, PGIM</td>
<td>Dennis Lamm, Fidelity Investments</td>
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<tr>
<td>Lynn Dudley, American Benefits Council</td>
<td>Les McCollum, ICMA-RC</td>
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<tr>
<td>Anne Lester</td>
<td>Mark Strosahl, Principal</td>
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<tr>
<td>Natalya Shnitser, Boston College Law School</td>
<td>Jeanne Wilson, U.S. Department of Labor</td>
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