



**DCIIA + SPARK Summer Public Policy Forum Series Agenda
July 15 - August 19, 2020**

Wednesday, July 15, 2020

Time	Topics and Speakers
11:00 am – 12:00 pm ET	<p style="text-align: center;">Opening Remarks John Geli, SS&C Technologies U.S. Representative Phil Roe, M.D. (R-TN)</p> <p style="text-align: center;">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</p>
12:00 pm – 12:30 pm ET	BREAK
12:30 pm – 1:20 pm ET	<p style="text-align: center;">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</p>

Wednesday, July 22, 2020

Time	Topics and Speakers
11:00 am – 12:00 pm ET	<p style="text-align: center;">Opening Remarks Mary Beth Glotzbach, Franklin Templeton U.S. Senator Ben Cardin (D-MD)</p> <p style="text-align: center;">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</p>



12:00 pm – 12:30 pm ET	BREAK	
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

Time	Topics and Speakers
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

Time	Topics and Speakers	
11:00 am – 12:00 pm ET	<p style="text-align: center;">Opening Remarks Rob Scheinerman, AIG Retirement Services</p> <p style="text-align: center;">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</p>	
12:00 pm – 12:30 pm ET	BREAK	
12:30 pm – 1:20 pm ET	<p style="text-align: center;">Engaging Participants Post Crisis Allie Shafer, SS&C Technologies (Moderator) Warren Cormier, DCIIA Alicia Hartjen, SS&C Technologies Megan Yost, Segal Benz</p>	
1:30 pm – 2:20 pm ET	CONCURRENT BREAKOUTS	
	<p>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</p>	<p>Industry Roundtable Discussion on Lifetime Income Disclosures Denise Gumlak, Enterprise Iron Financial Industry Solutions (Facilitator)</p>

Wednesday, August 12, 2020

Time	Topics and Speakers	
11:00 am – 12:00 pm ET	<p style="text-align: center;">Opening Remarks Tim Rouse, The SPARK Institute</p> <p style="text-align: center;">Recent Plan Litigation: Key Takeaways for Fiduciaries Mike Raso, PineBridge Investments (Moderator) DeMario Carswell, Goodwin Tom Clark, The Wagner Law Group</p>	



	<p>Jamie Fleckner, Goodwin Diane Gallagher, American Century Investments</p>	
12:00 pm – 12:30 pm ET	BREAK	
12:30 pm – 1:20 pm ET	<p>Trust: The Most Important Factor Neil Lloyd, Mercer (Moderator) Catherine Collinson, Transamerica Institute David Ireland, State Street Global Advisors Josef Pilger, EY</p>	
1:30 pm – 2:20 pm ET	CONCURRENT BREAKOUTS	
	<p>An Examination of Portability for Lifetime Income Ryan Grosdidier, SS&C Technologies (Moderator) Scott Colangelo, Prime Capital Investment Advisors Ralph Ferraro, Lincoln Financial Group Rick Luchinsky, American Century Investments Steve Manthie, Deloitte Hutch Schafer, Nationwide Financial</p>	<p>Adoption of ESG Globally Lisa Woll, US SIF (Moderator) Guillermo Cano, MSCI Sarah Bratton Hughes, Schroders Jeri Savage, Rocatton Stacey Tovrov, BlackRock</p>

Wednesday, August 19, 2020

Time	Topics and Speakers
11:00 am – 12:00 pm ET	<p style="text-align: center;">Opening Remarks Peg Knox, DCIIA</p> <p>Global Aging and Lifetime Income: How Should Global DC Systems Cope? Jody Strakosch, Strakosch Retirement Strategies, LLC (Moderator) Dr. Abigail Hurwitz, The Hebrew University of Jerusalem Per U.K. Linnemann, Linnemann Actuarial Consulting ApS Tim Pitney, TIAA Mark Rowlands, NEST Corporation</p>
12:00 pm – 12:30 pm ET	BREAK



12:30 pm – 1:20 pm ET	<p align="center">Will Europe Embrace DC Savings? John Mitchem, JM3 Projects (Moderator) Simon Colboc, FECIF European Pensions Institute Christian Lemaire, Amundi Ziga Vizintin, Slovenia</p>	
1:30 pm – 2:20 pm ET	<p align="center">CONCURRENT BREAKOUTS</p>	
	<p align="center">Role of the Employer in DC Plans Aron Szapiro, Morningstar (Moderator) Josh Cohen, PGIM Lynn Dudley, American Benefits Council Anne Lester Natalya Shnitser, Boston College Law School</p>	<p align="center">Fraud Prevention Doug Peterson, Empower Retirement (Moderator) Dennis Lamm, Fidelity Investments Les McCollum, ICMA-RC Mark Strosahl, Principal Jeanne Wilson, U.S. Department of Labor</p>