



**9<sup>th</sup> Annual DCIIA Public Policy Forum**

April 19-20, 2018, Mandarin Oriental Hotel, Washington, DC

**Thursday, April 19**

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- 11:45 a.m. – 1:00 p.m.      **Regional Ambassador Luncheon (*invitation only*)**  
Sackler Room
- 1:00 p.m.              **Registration**  
Grand Ballroom Foyer
- 2:00 p.m.              **Welcome Remarks**  
Melissa Kahn, State Street Global Advisors & DCIIA Public Policy Forum Co-Chair  
Grand Ballroom
- Please note most speakers are off-the-record. The final event agenda will note which speakers are on-the-record.*
- 2:15 – 3:00 p.m.      **Coverage Panel**  
Angela Antonelli, Center for Retirement Initiatives, Georgetown University  
David John, AARP Public Policy Institute  
Lori Lucas, Employee Benefit Research Institute (EBRI)  
Moderator: Lew Minsky, DCIIA
- 3:00 – 4:00 p.m.      **Fiduciary Panel**  
Lisa Bleier, Securities Industry and Financial Markets Association (SIFMA)  
Kelly Dunbar, WilmerHale  
James Szostek, American Council of Life Insurers (ACLI)  
Moderator: Robert Doyle, Prudential
- 4:00 – 4:30 p.m.      **Keynote Address**  
Amy Walter, National Editor, The Cook Political Report
- 4:30 – 5:00 p.m.      **Networking Break**  
Grand Ballroom Foyer
- 5:00 – 5:45 p.m.      **Think Tank Session**  
Jason Fichtner, Mercatus Center at George Mason University  
Charles Jeszeck, U.S. Government Accountability Office  
Christian Weller, Center for American Progress  
Moderator: Derek Dorn, TIAA
- 5:45 – 6:00 p.m.      **Closing Remarks**  
David Musto, Ascensus & DCIIA Chair  
Grand Ballroom
- 6:00 p.m.              **Cocktail Reception & Dinner**  
Cocktail Reception: Hillwood Foyer  
Dinner: Oriental Ballroom AB



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**Friday, April 20**

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- 7:30 – 9:15 a.m.      **Registration & Breakfast Buffet**  
Grand Ballroom Foyer
- Hotel check out is 12:00 p.m.*
- 7:45 – 8:45 a.m.      **Plan Sponsor Breakfast Meeting (invitation only)**  
Hirshhorn Room
- 8:00 – 8:45 a.m.      **Committee Meetings (Optional)**  
Global: Freer (Lower Level)  
Investment Policy & Design: Garden I (Lobby Level)  
Plan Administration: Portrait (Lower Level)  
Public Policy: Garden II (Lobby Level)  
Retirement Income: Gallery (Mezzanine Level)
- 9:00– 9:15 a.m.      **Welcome Remarks**  
Mike Raso, PineBridge Investments & DCIIA Public Policy Forum Co-Chair  
Grand Ballroom
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- 9:15 – 10:00 a.m.      **Litigation Panel**  
Jamie Fleckner, Goodwin Procter  
Joe Barton, Block & Leviton  
Moderator: David Levine, Groom Law Group
- 10:00 – 10:45 a.m.      **Congressional Panel**  
Beth Bell, Policy Director and Tax Council, Senator Ben Cardin (D-MD)  
Will Davis, Tax Policy Counsel, Congressman Tom Reed (R-NY)  
Kara Getz, Chief Counsel, U.S. House of Representatives Committee on Ways & Means  
Shay Hawkins, Legislative Assistant, Senator Tim Scott (R-SC)  
Moderator: Michael Kreps, Groom Law
- 10:45 – 11:15 a.m.      **Networking Break & Hotel Check-out (12:00 pm)**  
Grand Ballroom Foyer
- 11:15 a.m. – noon      **Fintech: Retirement Security Potential and Policy Changes**  
Karen Andres, Center for Financial Service Innovation (CFSI)  
Steve Boms, Consumer Financial Data Rights Group (CFDR)  
Warren Cormier, DCIIA  
Moderator: Aron Szapiro, Morningstar
- noon – 12:15 p.m.      **Closing Remarks**  
David Musto, Ascensus & DCIIA Chair
- 12:15 p.m.      **Boxed Lunch & Departures**  
Grand Ballroom Foyer