



9th Annual DCIIA Public Policy Forum

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

Thursday, April 19

- 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



9th Annual DCIIA Public Policy Forum

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

Friday, April 20

- 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

Please note most speakers are off-the-record. The final event agenda will note which speakers are on-the-record.
- 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