NCSL Foundation Retirement Security Symposium August 8, 2016

NCSL FOUNDATION for State Legislatures

Agenda

Meeting Location: McCormick Place, West Building, Room W181, Chicago

This symposium is made possible through the generous support of the NCSL Foundation Retirement Security Partnership.

Monday, August 8, 2016	
7:30 – 8 a.m.	Breakfast
8 – 9 a.m.	**The Retirement Readiness Gap: The Scope of a Looming Crisis** Who's saving, who's not? How much? How are various demographic groups preparing for retirement? What barriers have researchers identified regarding access and participation? Moderator: • *Andrew Peterson, Senior Staff Fellow, Retirement Systems, Society of Actuaries* Speakers: • *Brigitte Madrian, Aetna Professor of Public Policy and Corporate Management, Harvard Kennedy School of Government* • *Frank O'Connor, Vice President, Research and Outreach, Insured Retirement Institute*
9 – 9:15 a.m.	**ERISA in 15 Minutes: What State Policymakers Really Need to Know** Speaker: • *Michael Kreps, Principal, Groom Law Group*
9:15 – 9:25 a.m.	Break
9:25 – 10:20 a.m.	**Working Within a Voluntary, Employer-Based System: Marketplace Plans and Other Private Sector Savings Innovations** How are private sector providers innovating and partnering with states to expand coverage and insure savers receive adequate lifetime income? What is the current state of 401(k)s? How are newly-adopted "marketplace" plans being structured? How are providers reaching contingent workers to achieve the retirement security needs of the next economy? Moderator: • *Robert Melcher, Senior Research Analyst, Office of Legislative Services, New Jersey* Speakers: • *Catherine Collinson, President, Transamerica Institute and Transamerica Center for Retirement Studies* • *Jessica Duhamel, Director, Government Relations & Public Policy, Fidelity Investments* • *Carolyn McKinnon, Marketplace Director, Washington Small Business Retirement Marketplace*
10:20 – 10:30 a.m.	Break

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10:30 – 11:25 a.m.	**Adopting and Implementing State-Sponsored Retirement Savings Programs: Challenges and Opportunities** How are states crafting and implementing their own retirement savings programs to boost retirement savings for harder-to-reach populations? How are they working to avoid ERISA liability (or possibly embrace it), protect consumers, minimize burdens for employers, and manage their own legal and financial risks? Explore automatic enrollment IRA programs along with Multiple Employer Plans and prototype options. Moderator: • *Courtney Eccles, Program Manager, Invest in Illinois* Speakers: • *Sarah Mysiewicz Gill, Senior Legislative Representative, AARP* • *Senator Daniel Biss, Illinois* • *Senator Todd Weiler, Utah* • *Martin Noven, Senior Director, Government Markets, TIAA*
11:25 – 11:35 a.m.	Break
11:35 a.m. – 12:35 p.m.	**Retirement Savings Plan Considerations: Critical Issues for Employees, Employers, Providers and States** What are the priorities for key stakeholders, and how can state policymakers successfully balance their needs? What are the tradeoffs between various policy goals? What costs are involved (for both administering programs and for increased social spending if retirement savings challenges are not met)? Moderator: • *Angela Antonelli, Research Professor and Executive Director, Center for Retirement Initiatives, McCourt School of Public Policy, Georgetown University* Speakers: • *John Scott, Director, Retirement Savings, The Pew Charitable Trusts* • *Andrew Remo, Director of Legislative Affairs, American Retirement Association* • *Sven Wilson, Chair, Department of Political Science, Brigham Young University and Chief Economist, Notalys, LLC*
12:35 – 1 p.m.	Lunch