



GEORGETOWN UNIVERSITY

McCourt School of Public Policy

Center for Retirement Initiatives

CRI Policy Innovation Forum: Driving Change to Improve Long-Term Outcomes

Georgetown University Law School
Gewirz Student Center, 12th floor
120 F Street NW
Washington, DC

AGENDA*

MONDAY, JUNE 18

5:00 p.m.–6:30 p.m.

Networking Reception (for invited guests only)

Alta Strada Restaurant
465 K Street NW
Washington, DC

TUESDAY, JUNE 19

7:30 a.m.–8:00 a.m.

Registration Open & Breakfast Networking

8:00 a.m.–8:15 a.m.

Welcome and Opening Remarks

Angela M. Antonelli, Executive Director, CRI

8:15 a.m.–8:45 a.m.

What Does an Aging Population Mean for Economic Growth and Investments?

Paula Campbell Roberts, Director, Global Macro & Asset Allocation Team, Kohlberg Kravis Roberts & Co. (KKR)

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8:45 a.m.–9:30 a.m.

What is the Economic and Political Climate for Transforming How We Save for Retirement?

- *Moderator:* Jeffrey H. Snyder, Founder & CEO, The MorningPulse Inc.
- John Harwood, Editor at Large, CNBC
- Angela Moore, Senior Editor, MarketWatch

9:30 a.m.–10:20 a.m.

How is Technology Disrupting Retirement Savings?

- *Moderator:* Han Yik, Head of Institutional Investors, World Economic Forum
- Lisa Canafax, Partner, Mercer
- Carlos Garcia, Founder & CEO, Finhabits
- Jeff Rosenberger, Ph.D., COO, Guideline

10:20 a.m.–10:30 a.m.

Break

10:30 a.m.–11:30 a.m.

Are There Opportunities for Multi-State Collaboration among State-Facilitated Retirement Savings Programs?

- *Moderator:* David C. John, Senior Strategic Policy Advisor, AARP Public Policy Institute
- Tim Burgess, former Mayor, Seattle, Washington, and Member, Seattle Retirement Savings Plan Board of Administration
- John Chiang, Treasurer, State of California
- Kevin Cox, Head of Government Savings, Ascensus
- Beth Pearce, Treasurer, State of Vermont

11:30 a.m.–12:10 p.m.

Lunch Break

12:10 p.m.–1:00 p.m.

What Can DC Plans Learn from DB Plans?

- *Moderator:* W. Robert Phillips, Head of Consultant Relations, North America, BNY Mellon Investment Management
- Joe Fazzino, Senior Director, Pension Investments, United Technologies Corporation

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- Kevin T. Hanney, Senior Director, Pension Investments, United Technologies Corporation
- Jason Malinowski, Chief Investment Officer, Seattle City Employees' Retirement System
- Matthew Rauseo, Vice President, AQR Capital Management

1:00 p.m.–2:00 p.m.

Does the Addition of Alternative Assets Improve the Performance of Target Date Funds?

- *Moderator:* David Kaleda, Principal, Groom Law Group
- Kevin Albert, Partner and Managing Director, Pantheon
- Jahiz Barlas, Ph.D., Vice President, Multi-Asset Solutions Research Group, AllianceBernstein L.P.
- David O'Meara, Senior Investment Consultant, Willis Towers Watson
- Theresa J. Whitmarsh, Executive Director, Washington State Investment Board

2:00 p.m.– 2:50 p.m.

Can DC Plans Design Better Lifetime Income Options?

- *Moderator:* Martin Noven, Executive Director, State Universities Retirement System (SURS) of Illinois
- Hank H. Kim, Executive Director and Counsel, National Conference on Public Employee Retirement Systems (NCPERS)
- Kevin Lembo, Comptroller, State of Connecticut
- Grady M. Smith, Senior Portfolio Manager and Vice President, Dimensional Fund Advisors
- Timothy G. Walsh, Senior Managing Director, Institutional Investment Solutions Distribution, TIAA

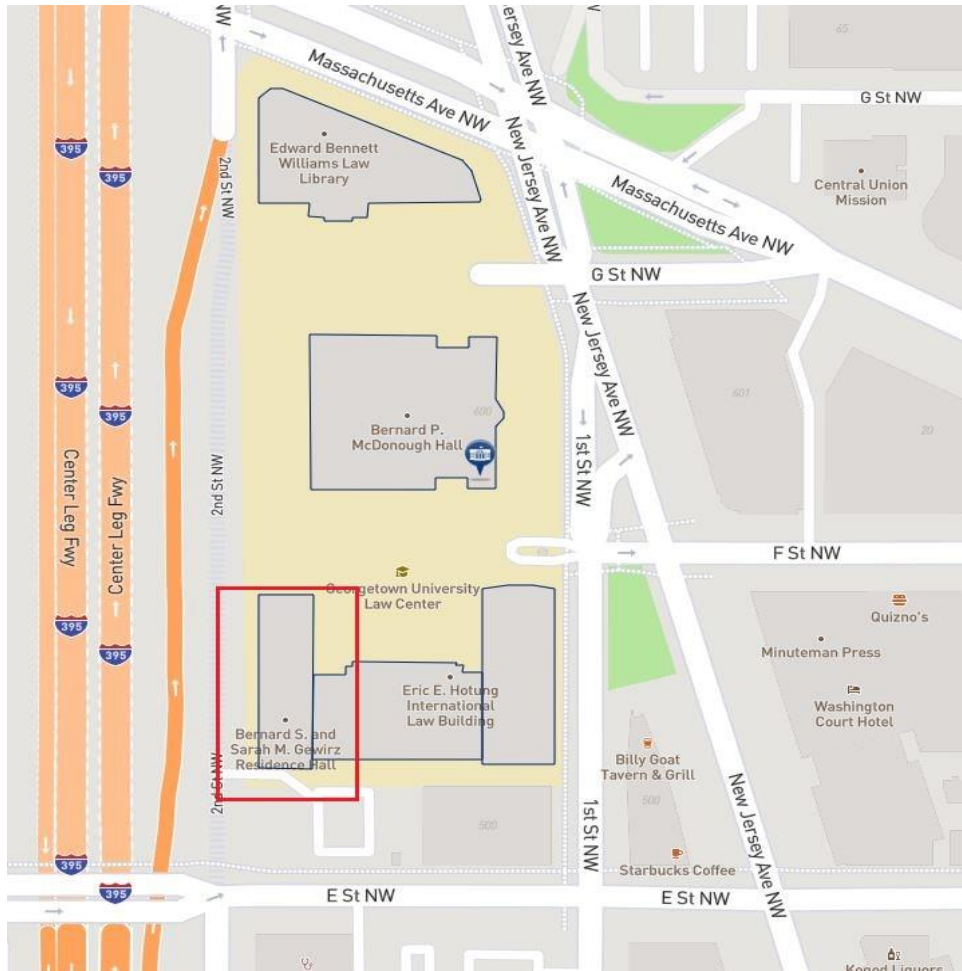
2:50 p.m.–3:00 p.m.

Closing Remarks

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CRI Forum Site Location

The Law Center is located near Union Station and Capitol Hill at 600 New Jersey Avenue NW, Washington, DC 20001. *The Gewirz Student Center faces McDonough Hall (the main Law Center building) and is located at 120 F Street NW (marked in the red box).*



Day of Meeting Contact Information:

Angela Antonelli, Executive Director, CRI

202-306-8540 (office cell)

ama288@georgetown.edu

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