



Present

AI, Alternatives, and Annuities: Ensuring Investor Protection in Retirement Policy

October 5, 2026

Georgetown University
McCourt School of Public Policy
125 E Street, NW
9th Floor Capitol Convening Center
Washington, D.C.

Description:

As the retirement ecosystem evolves in response to technological advancements and the changing financial needs of working and retired Americans, investment opportunities have expanded. Today's policy conversations include providing retirement savers a way to diversify retirement investments beyond public markets, deciding on draw-down strategies before reaching retirement age, and how to integrate private savings with Social Security. In this new age of retirement policy, it is essential to think about protections needed to ensure preservation of retirement savings and adherence to plan sponsors' fiduciary duties.

This conference brings together policy makers, regulators, industry experts, retirement service providers, academics, and the think tank community to discuss policies and practices that improve retirement security. The conference will focus on exploring solutions related to the evolution of investment decisions, default options, and fiduciary duties. Conference participants will engage in discussions that advance a holistic approach to retirement security and investor protection.

Agenda:

Breakfast & Registration: 9:00 a.m. – 9:55 a.m.

Welcome Remarks: 10:00 a.m.– 10:15 a.m.

- Richard Johnson Ph.D., Vice President, AARP Public Policy Institute
- Chantel Sheaks, Principal, Mindset
- Angela Antonelli, Research Professor and Executive Director, Center for Retirement Initiatives, McCourt School of Public Policy, Georgetown University

Panel 1: 10:15 a.m.- 11:15 a.m.

Title: Research Panel: The Role of Institutional Features and Behavioral Biases in Shaping Retirement Investing

Moderator: John Scott Ph.D., Project Director, Retirement Savings, The Pew Charitable Trusts

Panelists:

- Julie Agnew Ph.D., Professor, William and Mary
- Mark Egan Ph.D., Professor, Harvard Business School, Harvard University
- Jason Fichtner Ph.D., Executive Director, LIMRA Retirement Income Institute
- Alberto Rossi Ph.D., Professor, Georgetown University

Break: 11:15 a.m. - 11:30 a.m.

Panel 2: 11:30 a.m. – 1:00 p.m.

Title: Employer and Provider Panel: Product Innovation and the Evolution of Investor Needs

Moderator: Angela Antonelli, Research Professor and Executive Director, Center for Retirement Initiatives, McCourt School of Public Policy, Georgetown University

Panelists:

- Abdul Al-Asaad, Co-Founder and CEO, Basic Capital
- David Bazzel, Defined Contribution Product Specialist, Nationwide
- Edward Gottfried, Vice President of Product, Betterment
- Matt Reilly, Senior Associate, Mercer

Lunch: 1:00 p.m. – 1:30 p.m.

Keynote Address: 1:30 p.m.– 2:00 p.m.

Joseph H. Davis III Ph.D., Global Chief Economist and Global Head of Investment Strategy Group, Vanguard

Panel 3: 2:00 p.m.- 3:15 p.m.

Title: Policy Panel: Legal Perspectives on Investor Protection and Fiduciary Duty in an AI world

Moderator: Chantel Sheaks, Principal, Mindset

Panelists:

- Elizabeth Goldberg, Partner, Morgan Lewis
- Katherine Kohn, Partner, Thomson Hine
- Arsalan Malik, Senior Counsel, Groom Law Group

Break: 3:15 p.m.– 3:30 p.m.

Panel 4: 3:30 p.m.– 4:15 p.m.

Title: Way Forward for Retirement Security

Moderator: David C. John, Senior Strategic Policy Advisor, Public Policy Institute, AARP;
Nonresident Senior Fellow, The Brookings Institution

Panelists:

- Andrew Biggs Ph.D., Senior Fellow, American Enterprise Institute
- Peter Brady Ph.D., Senior Director, Investment Company Institute
- Jeffrey Brown Ph.D., Professor of Finance, University of Illinois Urbana-Champaign
- Monique Morrissey Ph.D., Senior Economist, Economic Policy Institute

Closing Remarks: 4:15 p.m.– 4:30 p.m.

- Richard Johnson Ph.D., Vice President, Financial Security, Public Policy Institute, AARP
- Chantel Sheaks, Principal, Mindset
- Angela Antonelli, Research Professor and Executive Director, Center for Retirement Initiatives, McCourt School of Public Policy, Georgetown University

Cocktails and Networking Reception: 4:30 p.m.– 6:00 p.m.