

EBRI-ERF Policy Forum #84
20 F Street, NW Conference Center
20 F Street, NW Suite 1000 Washington, DC 20001

Thursday, December 13, 2018
8:30 a.m. – 2:00 p.m.
Breakfast at 8:00 a.m.

Attendees List

Bold-Speakers

Name	Organization
Nevin Adams	American Retirement Association
Brian Agnew	Pfizer
Shai Akabas	Bipartisan Policy Center
Will Allen	FedEx
Eileen Ambrose	Kiplinger's Personal Finance Magazine
Jon Anderson	NRECA
Karen Andres	Center for Financial Services Innovation
Rob Andrews	Health Transformation Alliance
Angela Antonelli	Georgetown Center for Retirement Initiatives
Joseph Antos	AEI
Rob Austin	Alight
Gary Baker	CANNEX
Sudipto Banerjee	T. Rowe Price
David Barnes	IBM Corporation
Jana Barresi	Walmart
Steven Bass	Investment Company Institute
Adam Beck	AHIP
Paul V. Beddoe	Paul V. Beddoe Government Affairs, LLC
Derek Benson	Indiana Public Retirement System
Todd Berkley	Conduent
Mary Beth Franklin	Investment News
Michael Billet	U.S. Chamber of Commerce
David Blanchett	Morningstar
Troy Block	The Capital Group
Ilana Boivie	IAMAW
Peter Brady	ICI
Arin Bratt	Legal & General Investment Management America
Andrew Bressler	Bank of America
Sara Bridwell	Attain

Alison Brown
Beth Brown
Dana Brown
Daniel Bruns
Jean Calautti
Valerie Carpenter
Sharon Carson
Denise Clark
Josh Cohen
Amy Conley
Craig Copeland
Sabrina Corlette
Warren Cormier
Kathleen Coulombe
Virginia Cuadra
Kristine Custodio
John Cutler
Vinnie Daboul
Richard Davies
Erich Davis
Raymond Decker
Thomas DeRoche
Joshua Dietch
Michael Doshier
Lynn Dudley
Mike Dullaghan
Irena Dushi
Zahra Ebrahimi
Ali Esfahani
Douglas Fisher
Kathy Floyd
Howard Fluhr
Charles Ford
Joanne Frangias
Paul Fronstin
Kathleen George
Amanda Gilszmer
Ted Godbout
Susan Goldenson
Toni Griffin
Randi Griffin
David Guilmette
Tara Gulla

Community College of Baltimore County
VALIC
Willis Towers Watson
Morningstar

American Medical Association
J.P. Morgan Asset Management
U.S. Courts
Prudential
Financial Engines
EBRI
Georgetown University Health Policy Institute
DCIA RRC
ACLI
Archdiocese of Washington
Butterfield Schechter LLP
NASI
Sage Benefit Advisers
Independent Consultant
T. Rowe Price
AllianceBernstein
IFEBP
T. Rowe Price
Franklin Templeton
American Benefits Council
Putnam Investments
Social Security Administration
EBRI
USI
American Retirement Association
CPG
The Segal Company
US GAO
State Street Target Retirement
EBRI
ICMA-RC
IFEBP
American Retirement Association
Mercer
MetLife
NRECA
CIGNA
Prudential

Patrick Hain
Brett Hammond
Adrian Hanes
Will Hansen
Amanda Harding
Debbie Harrison
John Hartman
Catherine Harvey
Joseph Healy
Paul Heldman
Keren Hendel
Brooks Herman
Paula Hogan
Sarah Holden
Cindy Hounsell
Diann Howland
Allen Huffman
Jeff Hutson
Kathy Ireland
Jan Jacobson
Joanne Jacobson
Betsy Jaffe
Kevin B. Jenkins
Thomas Johnson
Rey Jomarron
Sam Jones
Marcy Keckler
Elizabeth Kelly
Chin Kim
Lorie Latham
Stewart Lawrence
John Lekel
Anne Lester
Rivka Liss-Levinson
Neil Lloyd
Michelle Long
Lori Lucas, CFA
Elizabeth Lyons
Sandy Mackenzie
Kevin Madden
Judy Mares
Gail Marksjarvis
Rachel Martin

National League of Cities
Capital Group
AAMC
The ERISA Industry Committee
AAMC
National Business Group on Health
Rocaton Investment Advisors
AARP
PIMCO
Heldman Simpson Partners
Congressional Budget Office
Strategic Insight
Hogan Financial Management
Investment Company Institute
WISER
American Benefits Council
Investment Company Institute
Indiana Public Retirement System (INPRS)
K.D. Ireland Consulting
American Benefits Council
Buck
EBRI
ADP- HCM
Retirement Clearinghouse
Millenium Trust Company
Merck
Ameriprise
United Income
Pacific Life
T. Rowe Price
Sibson Consulting
American Retirement Association
JPMorgan
Center for State and Local Government Excellence
Mercer
Kaiser Family Foundation
EBRI
Institute of Museum and Library Services
Self Employed
Hamilton Place Strategies
Mares Financial Consulting
Reuters
Bloomberg Law

P.M. McDermott
Ken McDonnell
Jane Meacham
Jeanette Merrill
Charles Miller
Tom Miller
Edmund Murphy
Doug Murray
Eunju Namkung
Diane Oakley
Shaun O'Brien
Brian O'Konski
Gene Paranczak
Benjamin Parish
Kerry H. Pechter
Carolyn Pemberton
Nancy Perry
Matthew Petersen
Jed Petty
AnnMarie Pino
Marcene Pugh
Louisa Quittman
Charles Rader
Janneke Ratcliffe
Jeannine Raymond
Conway Reinders
Donna Rosato
Jena Roscoe
Gary Rosenstein
Tim Rouse
Dwight Sanders SE
Katherine Sauer
Stacy Schaus
CJ Schwartzrock
Jessica Sclafani
John Scott
Andy See
Jason Seligman
Alison Shelton
Robert Sichel
Tami Simon
Mike Skinner
David Smith

Bureau of Consumer Financial Protection
Business & Legal Resources (BLR)
NYC Council Finance
Self Employed
AEI
Empower Retirement
Voya
American Benefits Council
NIRS
AFL-CIO
United Food and Commercial Workers
Vanguard
NAIFA
Retirement Income Journal
America Saves
ACLI
NAGDCA
Wellington Management
Greenwald & Associates
EBRI
US Department of the Treasury
UFCW
BCFP
NASRA
Social Security Advisory Board
Consumer Reports
Operation HOPE
Nationwide Financial
SPARK Institute
US Treasury
National Endowment for Financial Education
PIMCO
NRECA
Cerulli Associates
The Pew Charitable Trusts
IFEBP
Investment Company Institute
Pew Charitable Trusts
K&L Gates
The Segal Company
T. Rowe Price
EBRI

Ron Smith
James Smith
Joel Solomon
Jana Steele
Julie Stich
Christine Stokes
Linda Stone
Jody Strakosch
Vickie Strickland
Bonnie Summers
Jane Sung
Nicole Swift
Aron Szapiro
John Szczur
Jim Szostek
Emma Tatem
Catherine Theroux
David Timmons
Rusty Toler
Kenneth Townsend
Jeff Tulloch
John Turner
Jack VanDerhei
Elizabeth Varley
Michele Varnhagen
James Veneruso
Cindy Vogl
Phil Waldeck
Michael Wechsler
Mark Weinstein
Chris Weirath
G. William Hoagland
Spencer Williams
Diana Winalski
Cathy Windfield-Jones

ICMA-RC
Morningstar
National Education Association
Callan
IFEBP
Nuveen
WISER Fellow
Strakosch Retirement Strategies, LLC
Delta Air Lines
BCBSA
AARP
US Department of Labor
Morningstar
NRECA
ACLI
Social Security Advisory Board
LIMRA
Senate Committee on Finance
WISER

MetLife
Pension Policy Center
EBRI
Ameriprise
AARP
Callan
EBRI
Prudential
Pacific Maritime Association
ICUBA
Morningstar
Bipartisan Policy Center
Retirement Clearinghouse
International Paper
NRECA