

EBRI-ERF Policy Forum #86
20 F Street, NW Conference Center
20 F Street, NW Suite 1000 Washington, DC 20001

Thursday, December 12, 2019
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
John Adams	EBRI
Martin Ahrens	NRECA
Brenda Anderson	Nationwide Financial
Kathy Bakich	The Segal Group
Heather Balley	Alliance Bernstein
Sudipto Banerjee	T. Rowe Price
Adam Beck	AHIP
Todd Berkley	Conduent HR Services
Michael Billet	U.S. Chamber of Commerce
David Blanchett	Morningstar
Troy Block	American Funds/Capital Group
Teresa Bloom	Department of Labor
Rodney Bolden	Key Bank
Martin Booker	AARP
Peter Brady	ICI
Tamar Breslauer	Research Librarian
Ben Brewster	AVP
Alison Brown	Community College of Baltimore County
Adam Buckalew	Senate HELP Committee
Chris Byrd	WEX Health
Victoria Carrigan	TIAA
Drew Carrington	Franklin Templeton
Sharon Carson	J.P. Morgan Asset Mangement
Suzanne Clark	US Chamber of Commerce
Tara Coates	T. Rowe Price
Elizabeth Coogan	U.S. Department of Education
Craig Copeland	EBRI
Kevin Crain	Bank of America Merrill Lynch

Mike Cross
David Cruz
Danielle D'Abbraccio
Erich Davis
Jeanne de Cervens
Tom DeRoche
Joshua Dietch
Lynn Dudley
Irena Dushi
Zahra Ebrahimi
Jaininne Edwards
Tony Ellestad
Chibuzo Enemchukwu
Caroline Fauquier
Christina Fitzpatrick
Kathy Floyd
Howard Fluhr
Charles Ford
Sasha Franger
Paul Fronstin
Chris Gaston
Susan Goldenson
Marybeth Gray
Toni Griffin
Stuart Hagen
Kris Haltmeyer
Brett Hammond
Kerry Hannon
Sara Hansard
Debbie Harrison
Joseph Healy
Paul Heldman
Bill Hermann
Mark Hines
Lisa Hinz
Bob Holcomb
Sarah Holden
Steve Holsten
Cindy Hounsell
Diann Howland
Dr. Wei-Yin Hu
Allen Huffman
Kirsten Hunter

EBRI
New York Life
U.S. Department of Labor- EBSA
T. Rowe Price

IFEBP
T. Rowe Price
ABC
SSA
EBRI
District of Columbia
IFEBP
Nelu Solutions
Greenwald & Associates
AARP
CPG
The Segal Group, Inc.
Senior Analyst
Empower Retirement
EBRI
Davis & Harman
The Segal Group, Inc.
Trion Consulting, a Marsh & McLennan Agency, LLC
MetLife
BCBSA
Blue Cross Blue Shield Association
Capital Group
The New York Times/PBS Next Avenue/Forbes/MarketWatch
Bloomberg Law
National Business Group on Health
PIMCO
Heldman Simpson Partners
AARP
Pew Charitable Trusts
Wiser Women
Empower Retirement
Investment Company Institute

President
American Benefits Council
Edelman/Financial Engines
Government Affairs Officer - Retirement Security and Tax Policy
Fidelity

Jan Jacobson
Joanne Jacobson
Betsy Jaffe
David John
Thomas Johnson
Lisa Joldersma
Shyloe Jones
Jill Jones
Dennis Jones
Melissa Kahn
Peter Kapinos
Kostya Katz
Elizabeth Kelly
Jim Kilbride
James Klein
Ted Knutson
Gary Koenig
Kathy Kraninger
Joe Lamancusa
Brian Lamar
Lorie Latham
Anne Lester
Zhe Li
Neil Lloyd
Tammie Logan
Lori Lucas
Sandy Mackenzie
Geoffrey P. Manville
Judith Mares
Sandy McCarthy
Ken McDonnell
Tom Miller
AnhThu Miller
Alison Moore
Kaneeka Morris
Alicia Munnell
Alejandro Murguia
Elizabeth Myers
Keith Namiot
Charlie Nelson
Dagmar Nikles
Roger Norris
Shaun O'Brien

American Benefits Council

EBRI
AARP
Retirement Clearinghouse
PhRMA
National Business Group on Health
National Endowment for Financial Education
Principal
State Street Global Advisors
Empower Retirement
Morningstar, Inc.
Capital One
Buck Global
American Benefits Council
Forbes
AARP
CFPB
Nationwide Financial
T. Rowe Price
T. Rowe Price
JPMorgan
Analyst in Social Policy
Mercer

EBRI
Self-employed
Mercer
Mares Financial Consulting, LLC
OneAmerica
CFPB
AEI
T Rowe Price
HealthSavings
From the Heart Church Miniseries
Boston College Center for Retirement Research
Managing Principal
Analyst in Income Security
AXA-Equitable
Voya Financial
BlackRock
TIAA
AFSCME

Brian O'Konski	UFCW
Steven Oriol	President
Jim Palmieri	AARP
John Payne	Head of Consultant Relations
Chris Payne	Principal Financial Group
Carolyn Pemberton	America Saves
Matt Petersen	NAGDCA
Ashley Piatt	Department of Labor
AnnMarie Pino	Greenwald & Associates
Julie Ragatz	Nationwide Financial
Catherine Reilly	
Aliya Robinson	The ERISA Industry Committee
Kelly Rome	Prudential
Heather Rosen	Franklin Templeton
Daniel E. Rosshirt	Deloitte Consulting LLP
Katherine Roy	JPMorgan Asset Management
Dallas Salisbury	alrra.xyz
Dwight Sanders	Treasury
Stacy Schaus	Schaus Group
Laura Schlachtmeyer	CFPB
Andy See	IFEBP
Jason Seligman	Investment Company Institute
Chantel Sheaks	US Chamber of Commerce
Rachel Sheedy	Kiplinger's Retirement Report
Alison Shelton	Pew Charitable Trusts
Tami Simon	The Segal Group
Stuart Sirkin	The Segal Group
Ryan Smith	EBRI
David Smith	EBRI
Michael Sowa	Legal & General Investment Management America
Jake Spiegel	EBRI
Jana Steele	Callan Associates, Inc.
Julie Stich	IFEBP
Linda Stone	American Academy of Actuaries
John Szczur	NRECA
Mike Taylor	Prudential
Latoya Thomas	Doctor on Demand
Rusty Toler	WISER
Dave Van Zeeland	IFEBP
Jack VanDerhei	EBRI
Elizabeth Varley	Ameriprise Financial, Inc.
Michele Varnhagen	AARP
Jimmy Veneruso	Callan Associates, Inc.

Nathan Voris
G. Philip Waldeck, Jr.
Greg Ward
Regina Wasik
Kara Watkins
Michael H. Wechsler
Chris Weirath
Gal Wettstein
Jane White
Spencer Williams
Steve Wojcik
Rennie Worsfold
Ken Worthey

Charles Schwab & Co., Inc.
Prudential Retirement
Financial Finesse, Inc.
International Union of Bricklayers
Funding Our Future
Pacific Maritime Association
Morningstar, Inc.
Boston College Center for Retirement Research
Retirement Solutions
Retirement Clearinghouse
Business Group Health
Custodia Financial
National Credit Union Administration