AGENDA

Speaker Bios

8:30 am – 9:00 am Continental Breakfast and Networking

9:00 am – 9:05 am Welcome and Introduction

9:05 am – 9:45 am Results from the 2019 Retirement Confidence Survey: Gen Xer Attitudes and Preparations Towards Retirement

- Lisa Greenwald, Greenwald & Associates
- Craig Copeland, Employee Benefit Research Institute

9:45 am – 10:45 am Outreach and Tools from Government Agencies for Retirement Savings: A Panel Discussion

- [Jeanne Klinefelter Wilson](#), Deputy Assistant Secretary for Policy, DOL/EBSA
- [Tracie Morris Greenway](#), Senior Community Affairs Specialist, FDIC
- Michael Herndon, Deputy Assistant Director, Office for Older Americans, CFPB
- Alfredo Navarro, District Manager, Social Security Administration
- Moderated by: Lori Lucas, CFA, President and CEO, EBRI

10:45 am – 11:15 am Break

How are Gen Xers Faring in Retirement Preparations?


- Craig Copeland, Employee Benefit Research Institute

11:35 am – 12:05 pm Retirement Income Adequacy for Gen Xer’s: Who Is Going to Run Short of Money in Retirement and What Can Be Done to Prevent It?

- Jack VanDerhei, Employee Benefit Research Institute

12:05 pm – 12:20 pm ASEC Partner Updates

12:20 pm – 1:00 pm Networking Lunch