

**Choose  
to Save.<sup>®</sup>**

**Forum on  
Retirement  
Security and  
Personal  
Savings**

April 4–6, 2000  
Washington, DC

***Agenda Background Materials***

# Forum Agenda

Tuesday, April 4

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**Pre-Forum Event:** Noon luncheon and panel presentation at the National Press Club for media representatives and other guests to launch the *2000 Facts on Savings and Investing Campaign* sponsored by a coalition of public- and private-sector partners.

**4:00-7:00 p.m.** **Forum Pre-Registration** (*Ante Lobby*)

**5:00-6:00 p.m.** **Policy Board Meeting of the American Savings Education Council (ASEC)**  
(*Douglas Room*)

**6:00-7:00 p.m.** **Reception for all Choose To Save<sup>a</sup> Forum Delegates and Guests**  
(*Courtyard, weather permitting or Café Espresso*)

**7:00-9:00 p.m.** **Dinner and Keynote Speaker** (*Crystal Room*)

**The National Economy and the Outlook for  
Retirement Security and Personal Savings**  
*The Honorable Lawrence H. Summers,  
Secretary of the Treasury*

Wednesday, April 5

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**7:00-8:00 a.m.** **Registration** (*Ballroom Lobby*)

**7:00-8:00 a.m.** **Networking Breakfast** (*Crystal Room*)

**8:00-8:30 a.m.** **Welcome and Introductory Remarks** (*Ballroom*)  
*Dallas L. Salisbury, President, Employee Benefit Research Institute &  
Chairman, American Savings Education Council and  
Robert L. Reynolds, President, Fidelity Investments Institutional Retirement Group*

**8:30-9:30 a.m.** **Opening Keynote Session** (*Ballroom*)

**Pension Reform: Prospects and Implications for  
Retirement Security and Personal Savings**  
*The Honorable Benjamin L. Cardin (D-MD) and  
The Honorable Rob J. Portman (R-OH)  
U.S. House of Representatives*

**9:30-10:00 a.m.** **Increasing Participation: Overview** (*Ballroom*)  
*Weslie Kary, Gap Inc. and Donald H. Sauvigne, IBM Corporation*  
will highlight the agenda material regarding participation rates in retirement savings plans and discuss the experiences of IBM and The Gap in promoting participation among their workers. This presentation will serve to motivate the discussion of the first breakout session that will focus on increasing participation in retirement saving plans.

- 10:00-10:15 a.m. **Break**
- 10:15-11:45 p.m. **Breakout Sessions: Increasing Participation**  
*(Buchanan - Red Group, Douglas - Green Group, and Taft - Blue Group)*  
 The delegates will be divided into three teams: Red, Green and Blue. Each will retain its facilitator and delegate makeup and will work on the same material. Discussions will use materials provided in advance to facilitators. Facilitators will have the flexibility to lead their sessions as they choose to best develop the product requested of them in advance briefings. Facilitators will be provided with tools and ideas to achieve this. Each facilitator will determine if and when breaks are needed.
- 12:00-1:30 p.m. **Luncheon Keynote Address** *(Crystal Room)*  
**Social Security and the Internet:  
 Web-Based Information and Services**  
*The Honorable Kenneth S. Apfel,  
 Commissioner, Social Security Administration*
- 1:30-2:00 p.m. **Preserving Retirement Assets: Overview** *(Crystal Room)*  
*Kathryn A. Hopkins, Fidelity Institutional Retirement Services Company and  
 Paul J. Yakoboski, Employee Benefit Research Institute*  
 will review the agenda material on pre-retirement leakage of retirement savings (through cashouts at job change, loans, and withdrawals) and also discuss the needs of individuals in managing their accumulations once they reach retirement. This presentation will serve to motivate the discussion of the second breakout session that will focus on preserving retirement assets for retirement and then managing those assets in retirement so that they last a lifetime.
- 2:00-2:15 p.m. **Break**
- 2:15-3:15 p.m. **Breakout Sessions: Preserving Retirement Assets**  
*(Buchanan - Red Group, Douglas - Green Group, and Taft - Blue Group)*  
 The Red, Green and Blue teams will meet with their facilitator to discuss ways of preventing savings leakage. Discussions will use materials provided in advance to facilitators. Facilitators will have the flexibility to lead their sessions as they choose to best develop the product requested of them in advance briefings. Facilitators will be provided with tools and ideas to achieve this.
- 3:15-3:45 p.m. **Break for Delegates** *(Facilitators and Resource Persons meet)*
- 3:45-4:15 p.m. **Overview of eFORUM Technology** *(Ballroom)*  
*Don M. Blandin, American Savings Education Council and  
 Jonathan Ortman, The Public Forum Institute*  
 will provide an overview of the process developed to help the Forum be both informative and productive. eFORUM will be introduced through a few fun warm up questions, cover two demographic questions, and then lead delegates through a series of general questions.
- 4:15-5:30 p.m. **Increasing Participation and Preserving Assets: Review and Assessment**  
*(Ballroom)*  
 All delegates will re-convene in a plenary session to present ideas conceived during the day's discussions. Facilitators will be asked to share the most important thoughts and ideas generated in their breakout sessions for general review. Ideas will be presented by the facilitator who may then call on a representative from his or her breakout group to further elaborate. Facilitators will be asked to touch on areas of similarity to ideas

