2020 VISION: THE FUTURE OF RETIREMENT

TUESDAY, MARCH 3, 2020

THE WESTIN AT CITY CENTER | WASHINGTON, DC

NATIONAL INSTITUTE ON
Retirement Security

Reliable Research. Sensible Solutions.

SPEAKER BIOS

Alissa Quart is the executive editor of the journalism nonprofit Economic Hardship Reporting Project and is also the author of four previous acclaimed books, *Branded, Republic of Outsiders, Hothouse Kids*, and the poetry collection *Monetized*. She writes regularly for *The Guardian*, *The New York Times*, and *The New York Review of Books*, among other publications. In 2018, she was a Columbia University Graduate School of Journalism Alumni of the Year and won a documentary Emmy.

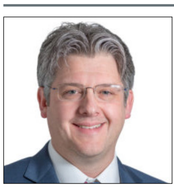
Dr. Christian Weller is a professor of public policy at the McCormack Graduate School of Policy and Global Studies at the University of Massachusetts, Boston and a Senior Fellow at the Center for American Progress. His area of expertise includes retirement income security, macroeconomics, money and banking, and international finance. He is also a research scholar at the University of Massachusetts Amherst's Political Economy Research Institute and an institute fellow at the University of Massachusetts Boston's Gerontology Institute. Prior to joining the Center, he was on the research staff at the Economic Policy Institute, where he remains a research associate. Christian has also worked at the Center for European Integration Studies at the University of Bonn in Germany; under the Department of Public Policy of the AFL-CIO in Washington, D.C.; and served in the banking sector in Germany, Belgium, and Poland. He is a respected academic with more than 100 academic and popular publications.

Dr. Juliette Cubanski is an Associate Director of the Program on Medicare Policy at KFF, where she has been conducting research and analysis on Medicare policy issues since 2004. At KFF, Dr. Cubanski leads analysis on Medicare prescription drug coverage and related policy issues, including analysis of trends in the Medicare Part D drug benefit program. In addition, she conducts research and analysis related to Medicare spending and financing, the financial burden of health spending among Medicare beneficiaries, and policy proposals related to Medicare reform. Dr. Cubanski earned a Ph.D. in health policy at Harvard University, a Masters of Public Policy and a Masters of Public Health from the University of California, Berkeley, and a Bachelor of Arts degree from the University of California at Los Angeles.

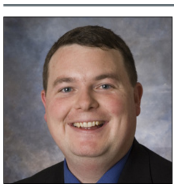
Tim Abrams has been the Executive Director for the Kentucky Retired Teachers Association since July 2017. Tim retired in June of 2017 completing his fifteenth year as superintendent of the Henry County Public Schools and 29th year public education in Kentucky. He began his education career in 1988 as a mathematics teacher at Henry County High School. He also served as the middle school assistant principal and principal before becoming the director of pupil personnel. He is a strong advocate for public education and its teachers who change lives for the better on a daily basis in Kentucky.

Elizabeth Althoff is the Legislative and Communications Coordinator for the Missouri Local Government Employees Retirement System. She joined the system in 2011 where she has held various roles in public relations, communication, and policy. She brings 15 years of experience in political advocacy, grassroots organization, and legislative affairs. At LAGERS, Elizabeth particularly enjoys focusing on stakeholder relations and communication through storytelling. She holds a B.A. in political science from Truman State University.

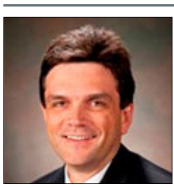
Tyler Bond is the research manager for the National Institute on Retirement Security. He works with the executive director to plan all NIRS research products. Since joining NIRS, Bond has co- authored a number of research reports and issue briefs on various topics relating to retirement security. He has also spoken at multiple conferences about NIRS research and has testified before the Oklahoma state legislature. Previously, Bond spent four years at the National Public Pension Coalition, where he directed the research program and authored six original research reports. He has also held positions on Capitol Hill and at the Center on Budget and Policy Priorities. Bond holds a B.A. in political science and philosophy from Indiana University and an M.A. in public policy from The George Washington University. He is a member of the National Academy of Social Insurance.



Dan Doonan is the executive director of the National Institute on Retirement Security. With the Board of Directors, he leads the organization's strategic planning, retirement research and education initiatives. He has more than 20 years of experience working on retirement issues from different vantage points including an analyst, consultant, trainer and even a plan trustee. In these various roles, the consistent theme has been his belief that Americans have a shared interest in creating and maintaining a resilient retirement infrastructure that provides adequate financial support in an efficient manner. He began his career at the Department of Labor as a mathematical statistician. He then spent seven years performing actuarial analysis with Buck Consultants in their retirement practice. His experience also includes positions as a research director and labor economist. Doonan holds a B.S. in Mathematics from Elizabethtown College and is a member of the National Academy of Social Insurance.



Dr. Shannon Ferrell is currently an Associate Professor in the Oklahoma State University Department of Agricultural Economics, where he specializes in Agricultural Law. As a member of the Department of Agricultural Economics, Shannon holds an extension and teaching appointment. Since joining Oklahoma State University, he has provided over 300 extension seminars and workshops throughout North America with a cumulative audience in excess of nearly 19,000 while authoring over fifty extension publications, including serving as lead author on the Farm Transition Workbook. His extension activities encompass all areas of agricultural law, and he also teaches the agricultural law courses at both Oklahoma State University and the University of Oklahoma College of Law.



Brian Guthrie is the Executive Director of the Teacher Retirement System of Texas. He has an extensive background in state government, legislative relations, budgeting and finance. He holds a master's degree in public affairs from The University of Texas at Austin's LBJ School of Public Affairs and bachelor's degrees from Franklin and Marshall College, Lancaster, PA. He began his public service career at the Legislative Budget Board. He has also served with the Texas Governor's Office of Budget, Planning and Policy and was budget advisor to two lieutenant governors.

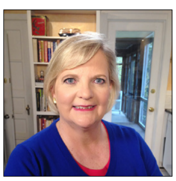
SPEAKER BIOS

Regina T. Jefferson is a nationally recognized authority on pension law, employee benefits, and tax law. In addition to teaching and producing a rich body of scholarship in these areas, she has been actively involved in the policy development of these fields. She has testified before Congress and briefed Congressional staff on employee benefits and tax topics. Professor Jefferson also was a delegate to the First White House Summit on Retirement Income Savings. In 2015, she was appointed by President Obama to the Pension Benefit Guaranty Corporation's Advisory Committee for a three year term; and then in 2019 she was reappointed by President Trump for a consecutive three year term. She also currently serves as an expert on taxation to the Permanent Observer Mission of the Holy See to the United Nations.

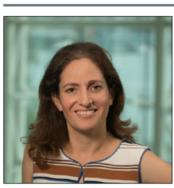
Bill Lucia is a senior reporter for Government Executive's Route Fifty, a news publication focused on state and local government affairs across the U.S. He regularly covers issues related to public finance, the state and local government workforce and federal court rulings that are significant for the states and localities. He previously covered Seattle city government for Crosscut, a news publication in Washington state. Bill has a master's degree in public administration from the University of Washington's Daniel J. Evans School of Public Policy and Governance.

Brian Perlman is Senior Vice President, Financial Services Practice Lead at Greenwald & Associates. Brian has more than 25 years of insurance and market research experience, and serves as Greenwald's financial services practice lead. As both a consumer psychologist and a financial planner, Brian's work focuses on product development and positioning studies for many of the nation's leading financial services companies and trade associations. He has given numerous speeches and presentations, is often cited in the press, and has led a number of key research studies designed for public release. Brian is also an experienced focus group moderator and in-depth interviewer, particularly adept at gaining research insights from financial professionals. Brian has both ChFC and CLU designations and a PhD in Psychology from the University of New Hampshire. He previously served as a director of strategic research for the American Council of Life Insurers.

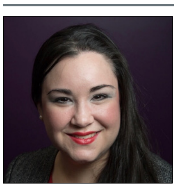
Dr. Laura Quinby is a research economist at the Center for Retirement Research at Boston College. She conducts research on state and locally administered retirement programs – including pensions, disability and retiree health insurance, Medicaid, and state initiatives to expand private-sector coverage – as well as Social Security. Quinby earned a Ph.D. in public policy from Harvard University in the fields of labor economics and public finance. Her work appears in academic journals, such as the Journal of Policy Analysis and Management and the Journal of Pension Economics and Finance, as well as issue briefs that are widely cited by policymakers and the media.



Elaine Ryan, MPA, is the Vice President of State Advocacy and Strategy Integration (SASI) in the Government Affairs Department of AARP. She leads a team of legislative staff who work with 53 state offices to advance AARP's state advocacy agenda with Governors and state legislators throughout the nation. This work is to enable individuals age 50 plus and their families to attain and maintain their financial and health security. Elaine earned her Master of Public Administration from the John F. Kennedy School of Government at Harvard University and a Bachelors in Economics from Fordham University.



Dr. Joelle Saad-Lessler is a labor economist with expertise in econometric modeling, statistical programming and in-depth data analysis. She holds a B.A. and Ph.D. in Economics from Columbia University. Dr. Saad-Lessler has published extensively on the American retirement savings system and on workers' savings shortfalls in that system.



Emily Spreiser is is the Pension Rights Center's legal program director. She provides legal and technical support to the Administration on Aging's National Pension Assistance Resource Center. Emily has prior experience at the Employee Benefits Security Administration of the U.S. Department of Labor where she provided education and informal dispute resolution to employee benefit plan participants, sponsors and administrators. Emily has a B.A. from Brandeis University and a J.D. from the Boston University School of Law.

Akio Tagawa is one of the founders of Linea Solutions and has been consulting for retirement systems since 1998. He has over nineteen years of experience in IT and specializes in project management, business analysis, business process reengineering and organizational change management for retirement systems. Akio oversees Linea's consulting operations outside of California. As a thought leader, Akio is credited with driving software vendors in the pension industry to deliver solutions using agile software development techniques. He has been working with vendors on these techniques since 2010 to outline better approaches to the delivery of software functionality to the industry. He speaks regularly at conferences and assists clients with strategic planning for major initiatives.

Anita Yadavalli is the Program Director of City Fiscal Policy at NLC. Anita leads NLC's Public Sector Retirement initiative, with a focus on research and education for city leaders on pensions and retiree healthcare benefits. She has also conducted research on state preemption of local authority, as well as on housing markets. Prior to joining NLC, she worked for the Indiana General Assembly as a senior fiscal analyst. In her role, she conducted impact analyses and econometric research on economic development issues related to enterprise zones and tax increment financing. Anita received her Ph.D. in economics from Purdue University.

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Laborers National Pension Fund
LEOFF Plan 2 Retirement Board
LiUNA Staff and Affiliates Pension Fund
Louisiana State Employees' Retirement System
Maine Public Employees Retirement System
Michigan Office of Retirement Services
Minnesota State Board of Investment
Minnesota State Retirement System
Mississippi Public Employees Retirement System
Missouri Local Government Employees Retirement System (LAGERS)
MoDot and Patrol Employees' Retirement System
Municipal Employees' Retirement System of Michigan
New Hampshire Retirement System
New Mexico Educational Retirement Board
New York State and Local Retirement System
North Carolina Retirement Systems
North Dakota Public Employees Retirement System
North Dakota Retirement and Investment Office
Omaha School Employees' Retirement System
Orange County Employees Retirement System
Oregon Public Employees Retirement System
Pennsylvania State Employees Retirement System
Public Employee Benefits Authority of South Carolina
Public Employees Retirement Association of Minnesota
Public Employee Retirement System of Idaho
Public Employees' Retirement System of Nevada
San Antonio Fire & Police Pension Fund
School Employees Retirement System of Ohio
Sonoma County Employees' Retirement Association
State Teachers Retirement System of Ohio
Teachers Retirement System of Georgia
Teachers' Retirement System of Louisiana
Teachers' Retirement System of New York City
Tennessee Consolidated Retirement System
Texas County & District Retirement System
Texas Municipal Retirement System
The Educational Employees' Supplementary Retirement System of Fairfax County
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