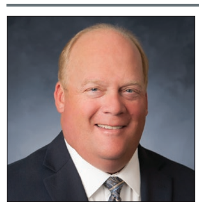
SPEAKER BIOS

Earl Pomeroy is a Senior Counsel at the law firm of Alston & Bird, LLP. Prior to joining Alston & Bird, Pomeroy represented North Dakota in the U.S. House of Representatives from 1993 to 2011. He also served as the State Insurance Commissioner for North Dakota in 1984 and president of the National Association of Insurance Commissioners. He has a B.A. in political science from the University of North Dakota at Grand Forks and a J.D. from the University of North Dakota School of Law.

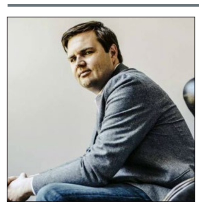
Ida Rademacher is the Executive Director of the Initiative on Financial Security at the Aspen Institute. From 2007 to 2014, she served in senior leadership roles at the Corporation for Enterprise Development. Her prior positions include Senior Research Officer with the Center for Applied Behavioral and Evaluation Research at the Academy for Educational Development and Associate Director of the Aspen Institute Workforce Strategies Initiative. She pursued postgraduate studies in economic anthropology at the University of Melbourne; she holds an M.P.A. degree summa cum laude from the University of Maryland; and a B.S. degree, summa cum laude, in anthropology and economics from James Madison University.

John Scott is the Director of the Retirement Savings Project at the Pew Charitable Trusts. Prior to joining Pew, Scott taught and conducted research at the University of North Carolina at Chapel Hill and continues to hold an adjunct professorship in UNC's Department of Public Policy. Scott began his career as a tax attorney and consultant in the financial services industry with a focus on pension plan design and legal compliance issues. John has a B.A. in economics from Swarthmore College, a J.D. from Pennsylvania State University, an M.A. in Sociology from the University of Maryland, and a Ph.D. in Sociology from Cornell University.

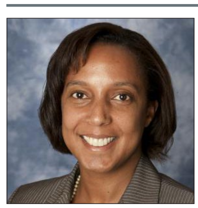
Jon Sheiner has been involved in government affairs for over 36 years, beginning as Consolidated Edison of New York's first Washington representative. He later served as an Assistant to the Chairman on the U.S. House of Representatives' Committee on Ways and Means. Working with Congressman Rangel he worked extensively on tax and pension matters, health care financing, trade, Social Security, and income security issues. He has a B.A. in American Studies from the George Washington University and a J.D. from the New York University School of Law.



Gregory W. Smith is the Executive Director and CEO of Colorado PERA. Prior to his tenure as the Executive Director, he served as General Counsel beginning in 2002. Previously, he was an Equity Partner at Hamilton Faatz, P.C. He currently serves as Chair of the National Institute on Retirement Security (NIRS) and he is the Chair of the Administrator Education Committee for the National Council on Teacher Retirement (NCTR). He received a B.S. degree in Business Administration from the University of Colorado, Boulder and holds a J.D. from the University of Denver.



J.D. Vance grew up in the Rust Belt city of Middletown, Ohio, and the Appalachian town of Jackson, Kentucky. He enlisted in the Marine Corps after high school and served in Iraq. A graduate of the Ohio State University and Yale Law School, he has contributed to the *National Review* and the *New York Times* and has appeared on Fox News, CNN, MSNBC, and CNBC. Currently, Vance works as a principal at a leading Silicon Valley investment firm.



Aliya Wong is the Executive Director of Retirement Policy at the United States Chamber of Commerce. Before joining the Chamber, Wong was a practicing attorney specializing in ERISA and tax qualification matters related to pension, health and welfare plans, and executive compensation issues. She received a B.A. in economics and African studies from Yale University and a J.D. from the New York University School of Law, where she also received an LL.M in Taxation.

RETIREMENT POLICY GAME CHANGERS: TACKLING RETIREMENT READINESS

TUESDAY, FEBRUARY 28, 2017

THE LIAISON CAPITOL HILL | WASHINGTON, DC

NATIONAL INSTITUTE ON
Retirement Security

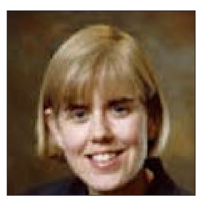
Reliable Research. Sensible Solutions.

SPEAKER BIOS

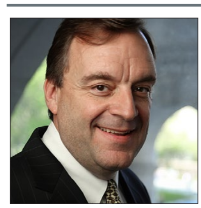
Keith Brainard serves as Research Director for the National Association of State Retirement Administrators (NASRA). He is the co-author of *The Governmental Plans Answer Book*, Third Edition, and created and maintains the Public Fund Survey. Additionally, he created the State & Local Pension Exchange and is a recipient of the Award for Excellence in Government Finance from the Government Finance Officers Association. He holds a B.A. and an M.P.A. from the University of Texas at Austin.

Senator William Cassidy is currently the United States Senator for Louisiana and has served since 2015. From 2008 to 2014, he represented Louisiana's Sixth Congressional District in the U.S. House of Representatives. In 2006, Sen. Cassidy was elected to the Louisiana State Senate. Sen. Cassidy grew up in Baton Rouge, Louisiana and attended Louisiana State University (LSU) for his undergraduate studies and for Medical School.

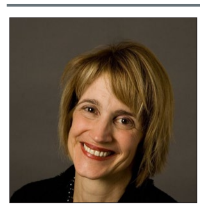
Representative Joe Crowley is currently the United States Congressman for New York's 14th Congressional District and serves as the Democratic Caucus Vice-Chairman of the United States House of Representatives. From 1999 to 2013, he served as the U.S. Congressman for New York's 7th District. From 1987 to 1998 he served as a New York State Assemblyman for the 30th District of New York. Rep. Crowley was born in New York City and graduated from Queens Colleges with a degree in political science.



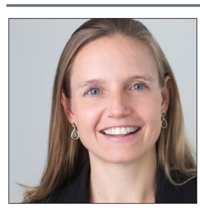
Lynn Dudley is the Senior Vice President of Global Retirement and Compensation Policy for the American Benefits Council. She has held senior positions at the Council since 1991, including stints as Vice President of Retirement Policy; Vice President and Senior Counsel; and Senior Vice President. Prior to joining the Council, she was a legal consultant for Sungard Employee Benefits Systems. She was engaged in the private practice of law for several years with the law firm of Berkowitz, Lefkovits, Isom and Kushner. She earned her undergraduate degree at Vanderbilt University, a law degree from Cumberland School of Law, and a LL.M. in taxation from the University of Florida.



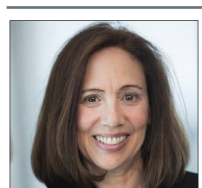
Scott Evans is the Deputy Comptroller for Asset Management and Chief Investment Officer for the New York City Retirement System. Prior to his appointment, Evans was most recently Executive Vice President of TIAA-CREF and President of its Asset Management subsidiaries. In addition to his responsibilities to New York City, Evans currently serves as a member of the investment committees of the William T. Grant Foundation, Tufts University and the Dutch pension fund ABP. Additionally, he is a trustee of the IFRS Foundation. He holds a CFA designation, earned an M.M. from Northwestern University's Kellogg School of Management, and holds a B.A. in economics from Tufts University.



Teresa Ghilarducci is the Bernard L. and Irene Schwartz Chair in economic policy analysis and directs the Schwartz Center for Economic Policy Analysis (SCEPA). She joined The New School in 2008 after 25 years as a professor of economics at the University of Notre Dame. She is the author of *Rescuing Retirement*, which is co-authored with Blackstone's Tony James. Her previous books include *How to Retire with Enough Money*, *When I'm Sixty-Four: The Plot Against Pensions and the Plan to Save Them*, and *Labor's Capital: The Economics and Politics of Employer Pensions*. Ghilarducci received her Ph.D. in economics from the University of California at Berkeley.



Fiona Greig is the Director of Consumer Research for the JPMorgan Chase Institute. Previously, she served as the Deputy Budget Director for the City of Philadelphia from 2012 through 2014 and as an Adjunct Professor at the University of Pennsylvania. Prior to that, Greig was a consultant at McKinsey & Company. She holds a B.A. from Stanford University and a Ph.D. in Public Policy from Harvard University.



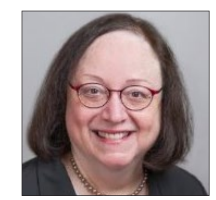
Melissa Kahn is a Managing Director and Retirement Policy Strategist with State Street Global Advisors (SSGA). She is tasked with strengthening SSGA's position as an advocate supporting retirement and pension related issues. She is focused on increasing SSGA's engagement with key policy makers and leveraging these connections to inform future research projects. Prior to joining SSGA, Kahn established MJKAHN Associates, LLC, a benefits consulting firm. Kahn was also a vice president with MetLife for 12 years. She was based in MetLife's Washington, DC Government Relations office. Kahn holds a J.D. from Georgetown University Law Center and a B.A. from Cornell University.

SPEAKER BIOS

Michael P. Kreps is a Principal at Groom Law Group. Previously, Kreps served as the Senior Pensions and Employment Counsel to Chairman Tom Harkin for the U.S. Senate HELP Committee from the 110th through the 114th Congresses. He holds a J.D., with honors, from the George Washington University Law School and a B.A., with distinction, in history and art history from the University of Colorado.

James B. Lockhart III co-chairs Bipartisan Policy Center's (BPC) Commission on Retirement Security and Personal Savings. He is Vice Chairman of WL Ross & Co. LLC and serves on investment committees including the two mortgage funds, the WLR Recovery Funds and Invesco Mortgage Recovery Fund. Prior to his service with BPC and WL Ross & Co., he served as Deputy Commissioner and Chief Operating Officer of the Social Security Administration, Secretary to its Board of Trustees, and a Member of President George W. Bush's Management Council. He holds an undergraduate degree from Yale University and an M.B.A. from Harvard Business School.

Gerri Madrid-Davis is the Director of Financial Security & Consumer Affairs in the Office of State Advocacy & Strategy Integration, Government Affairs at AARP. Prior to joining AARP, she served as the Executive Director of the National Public Pension Coalition. Formerly, she was the Senior Committee Director for Labor and Economic Development at the National Conference of State Legislatures (NCSL) in the Office of State Federal Relations. She earned undergraduate degrees in anthropology and women's studies at Metropolitan State College in Denver and completed her Master of Arts in Public Affairs coursework at the Hubert H. Humphrey Institute of Public Affairs at the University of Minnesota.

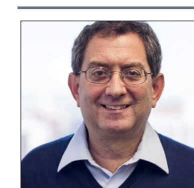


Janice Mays is a Managing Director in PwC's Washington National Tax Services (WNTS). Prior to joining PwC, Mays served as Chief Counsel and Chief Tax Counsel for the Committee on Ways and Means in the U.S. House of Representatives. Janice began her service with the Committee in 1975 as Tax Counsel. During her tenure, she was closely involved with much tax legislation, including the Tax Reform Act of 1986. In addition, she worked extensively on health reform and international trade legislation. She holds an undergraduate degree from Wesleyan College, a J.D. from the University of Georgia School of Law, and an LL.M. in Tax from the Georgetown University Law Center.

Diane Oakley is the Executive Director of the National Institute on Retirement Security. Prior to joining NIRS, Oakley served as senior policy advisor to Congressman Earl Pomeroy, who represented the state of North Dakota and worked to achieve policy solutions on a range of tax, pension, Social Security, and workforce issues. Additionally, Oakley has held executive, leadership and technical positions with TIAA-CREF. She holds a B.S. degree from Fairfield University and an M.B.A. in Finance from Fordham University.

Helaine Olen is the author of *Pound Foolish: Exposing the Dark Side of the Personal Finance Industry* and the co-author of *The Index Card: Why Personal Finance Doesn't Have to be Complicated*. She also writes the personal finance column "Spread the Wealth" for *Inc*. As a regular contributor to *Pacific Standard* magazine and Reuters' "The Great Debate" series, her work has been published in numerous print and online publications. She most recently was a columnist at *Slate*. Olen graduated from Smith College and attended the University of Minnesota.

Councilwoman Cherelle L. Parker proudly serves the 9th Council District in Philadelphia. Prior to her election in November 2015, Councilwoman Parker served for 10 years as the State Representative for the 200th Legislative District in the Pennsylvania House of Representatives, where she became the youngest African-American woman ever elected in September 2005. She has a B.S. degree from Lincoln University.



Brian Perlman serves as Senior Vice President, Financial Service Practice Lead for Greenwald & Associates. Prior to his 17-year tenure at Greenwald, he served as the Director of Research for the American Council of Life Insurers for over 10 years. Perlman has both ChFC and CLU designations and a Ph.D. in Social Psychology from the University of New Hampshire.