National Institute on Retirement Security

Reliable Research. Sensible Solutions.

2026 Annual Retirement Policy Conference

MARCH 3, 2026

Securing Retirement *for* Future Generations

#SecuringRetirement2026

Agenda

#SecuringRetirement2026

8:00 AM	**Breakfast**
9:00 AM	**Welcome and Opening Remarks** **Michael Hairston,** National Institute on Retirement Security Vice Chair
9:15 AM	**Keynote	Social Security at the Crossroads: Securing a Program Americans Can Trust and Rely on for Retirement Security** **Honorable Martin O'Malley,** Former Social Security Commissioner and Governor of Maryland
9:45 AM	**Panel Conversation	Putting the Squeeze on Retirement: Affordability, Housing, and Inflation** • **Kathryn Edwards,** Labor Economist, *Bloomberg* Columnist, and Host of Optimist Economy Podcast • **Jessica Lautz,** National Association of Realtors Deputy Chief Economist and Vice President of Research • **Michelle Singletary,** *Washington Post* Personal Finance Columnist Moderator: **Nancy Marshall-Genzer,** *MarketPlace* Correspondent
10:45 AM	**Networking Break**
11:00 AM	**Keynote	Navigating the Growing Uncertainty: Retirement Security in a Changing Economy** **Christian Weller,** Professor and Chair of Public Policy and Public Affairs Department of University of Massachusetts Boston
11:45 AM	**Networking Lunch and Book Signing**
1:00 PM	**Panel Conversation	Approaching Full Funding: Public Pension Plan Considerations** • **Katie Comstock,** Aon Partner and Head of Public Sector Solutions • **Joe Newton, Gabriel,** Roeder, Smith & Company Pension Market Leader and Actuary • **Todd Tauzer,** Segal Senior Vice President and Actuary Moderator: **Dan Doonan,** National Institute on Retirement Security Executive Director
2:00 PM	**Panel Conversation	The Retirement System Gen X Inherited and How It's Failing Them** • **Kerry Hannon,** *Yahoo Finance* Senior Columnist and Author of *Retirement Bites: A Gen X Guide to Securing Your Financial Future* • **Jason Fichtner,** LIMRA Alliance for Lifetime Income Executive Director Moderator: **Stephanie Dhue,** *CNBC* Senior Producer
3:00 PM	**Closing Keynote	Long-Term Care, Costs, and Choice: Strengthening Retirement Security Through the WISH Act** **Honorable Thomas Suozzi,** U.S. Representative for New York's Third Congressional District
3:15 PM	**Closing** **Dan Doonan,** National Institute on Retirement Security Executive Director

Conference Speakers

Katie Comstock

Katie Comstock is Partner, Head of Public Sector Solutions, at Aon Investments. She has served Aon's investment consulting practice for over 15 years. Her primary focus is the public arena on governance, investment policy, asset-liability analysis, asset allocation reviews, risk budgeting, and portfolio structure. Comstock consults to a range of state and local public entities with aggregate assets under management of over $400 billion. As Public Sector Solutions Lead, she coordinates the firm's strategic efforts across solutions, thought leadership, and market presence. She is also a member of Aon Investment's U.S. Investment Committee. Comstock serves on the NIRS Board of Directors and represents Aon on the National Council of Teacher Retirement's Corporate Advisory Committee. She earned a B.B.A. in finance from the Goizueta Business School and a B.S. in psychology from Emory University.

Stephanie Dhue

Stephanie Dhue is an Emmy Award-winning journalist and senior producer at CNBC, where she has spent more than a decade shaping the network's high-impact coverage of politics, personal finance, and global events. Based in Washington, D.C., she brings a deep understanding of business, policy, and regulation to CNBC's multiplatform journalism. Her reporting helps audiences make sense of how public policy decisions affect markets, companies, and consumers. She holds a M.B.A. from the University of Virginia's Darden School of Business.

Dan Doonan

Dan Doonan is the Executive Director of NIRS. 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 as 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 U.S. 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.

Kathryn Edwards

Kathryn Anne Edwards is a Ph.D. Economist, independent economic policy consultant, Bloomberg columnist, and host of the *Optimist Economy* podcast. Her research focuses on the intersection of labor markets and public policy, including unemployment and unemployment insurance (UI); recessions and recoveries; women's labor supply; poverty alleviation; retirement security; and Social Security. She previously served as an economist at RAND.

Jason Fichtner

Jason J. Fichtner is Executive Director of the LIMRA Retirement Income Institute. His areas of expertise include Social Security, federal tax policy, federal budget policy, retirement security, and policy proposals to increase saving and investment. He is a Policy Fellow at the Stanford Institute for Economic Policy Research (SIEPR) at Stanford University, a Senior Policy Fellow at the Center for Social Development (CSD) at the Brown School, Washington University in St. Louis, and a Senior Fellow at the National Academy of Social Insurance (NASI). Fichtner is on the Board of Directors for the FINRA Investor Education Foundation and a member of the Puerto Rico Pension Reserve Trust, where he serves on both the Pension Benefits Council and the Pension Reserve Board. Fichtner earned his B.A. from the University of Michigan; his M.P.P. from Georgetown University; and his Ph.D. from Virginia Tech.

Kerry Hannon

Kerry Hannon is a Senior Columnist for Yahoo Finance and a workplace futurist and strategist on career transitions, entrepreneurship, personal finance, and retirement. She is a frequent TV, radio, and podcast commentator and is a sought-after keynote speaker. She is the award-winning author of 14 books, including In *Control at 50+: How to Succeed in The New World of Work, Great Jobs for Everyone 50+: Finding Work That Keeps You Happy and Healthy . . . And Pays the Bills, Great Pajama Jobs: Your Complete Guide to Working from Home,* and *Never Too Old to Get Rich:* The Entrepreneur's Guide to Starting a Business Mid-Life. Before joining Yahoo Finance, she was an expert columnist, opinion writer, and regular contributor to *The New York Times, MarketWatch, Forbes,* and a personal finance and entrepreneurship expert on the PBS website NextAvenue.org. Millions of viewers, readers, and listeners have been motivated by Hannon's can-do, down-to-earth message. She has appeared as a career and financial expert on The Dr. Phil Show ABC, CBS, CNBC, NBC Nightly News, NPR, Yahoo Finance, and PBS.

Conference Speakers

Michael Hairston

Michael Hairston is a Senior Pension Specialist for the National Education Association where he works to protect, preserve, and enhance the retirement security of the over 2.9 million members of the National Education Association. Prior to joining NEA, Hairston served over 30 years in the classroom as music teacher. His teaching career in Fairfax County Public Schools spanned over 20 years. Hairston also served over a decade as a trustee on the Board of the Educational Employees Retirement System of Fairfax County Public Schools. Prior to his appointment at Luther Jackson Middle School, he served as President of the Fairfax Education Association. Currently, he serves on the National Council on Teacher Retirements Corporate Advisors Committee, and the NIRS Board of Directors, National Public Pension Coalitions Board, and is Secretary of the International Foundation of Employee Benefits Public Employees Board. Hairston received a B.S. from North Carolina A&T State University and a master's degree from The Ohio State University.

Dr. Jessica Lautz

Dr. Jessica Lautz is the Deputy Chief Economist and Vice President of Research at the National Association of REALTORS® (NAR). She has been with NAR since 2007. The core of her research focuses on analyzing trends for both NAR members and housing consumers. She is a frequent speaker and commentator on the real estate market and has testified before Congress on behalf of NAR. She also volunteers at Nottingham Trent University as an industry fellow mentoring real estate graduate students, is a committee chair at the National Association of Business Economics, bakes birthday cakes for underserved youth with Cake4Kids, and sits on the board of the Food Recovery Network. Dr. Lautz has been recognized by Housing Wire's Women of Influence and received the RISMedia's Newsmaker award. She received a Doctorate of Real Estate from Nottingham Trent University in the United Kingdom. She also holds a M.P.P. from American University and undergraduate degrees in political science and law and justice from Central Washington University.

Nancy Marshall-Genzer

Nancy Marshall-Genzer covers Washington, D.C., for *Marketplace.* She has a wide range of interests and has reported on everything from homelessness to government shutdowns and the history of the Federal Reserve. Before joining *Marketplace,* she worked in the National Public Radio (NPR) newscast unit as a producer and fill-in editor and newscaster. She also worked at WAMU, the NPR affiliate in Washington. In 2023, Marshall-Genzer was honored with a Gracie Award for a story on how pediatricians were coping with the end of the federal government's COVID public health emergency. The story also won a National Headliner Award and a Society of Professional Journalists award.

NATIONAL INSTITUTE ON RETIREMENT SECURITY | 2026 ANNUAL RETIREMENT POLICY CONFERENCE

Joe Newton

Joe Newton is Pension Market Leader for GRS Consulting. He is a nationally recognized public sector actuary who works with numerous statewide, regional, and local retirement systems and has more than 20 years of actuarial and benefits consulting experience. Newton functions in one of the most senior professional roles in GRS, providing significant firm-wide leadership. This role bridges the gap between industry requirements, internal processes, and client deliverables to further strengthen GRS' position in the marketplace. Newton is an appointed member on the Associate Advisory Committee of the National Association of State Retirement Administrators (NASRA) where he provides support for NASRA's vital initiatives to support public employee benefit programs across the country. He earned a B.A. in mathematics and business administration from Austin College.

Martin O'Malley

Martin O'Malley is a Democratic politician and author who served as Mayor of Baltimore from 1999 to 2007, Governor of Maryland from 2007 to 2015, and Commissioner of the Social Security Administration (SSA) from 2023 to 2024. Early in his career he worked as an assistant state's attorney in Baltimore and was elected to the Baltimore City Council. O'Malley later became mayor, where he gained national attention for using data-driven management tools like CitiStat to reduce crime and improve city services. As governor, he advanced progressive policies including abolishing the death penalty, legalizing same-sex marriage, investing in education and infrastructure, and strengthening gun safety through the Firearms Safety Act of 2013 while prioritizing environmental restoration of the Chesapeake Bay and renewable energy. As Commissioner of SSA, O'Malley was responsible for administering the Social Security retirement, disability, and survivors insurance programs that pay over 1.4 trillion dollars annually in benefits to more than 66 million beneficiaries, as well as the Supplemental Security Income program that provides cash assistance to approximately 7.5 million people with limited income and resources. His tenure was noted for revitalizing the SSA through data-driven management, improved customer service, and modernization efforts, all achieved despite operating under staffing constraints and budgetary limitations. O'Malley ran for the 2016 Democratic presidential nomination on a platform of economic opportunity and progressive reform and is the author of *Smarter Government: How to Govern for Results in the Information Age,* reflecting his long-standing focus on performance-driven government. He earned a B.A. from Catholic University and a J.D. from the University of Maryland School of Law.

Michelle Singletary

Michelle Singletary is the nationally syndicated personal finance columnist for *The Washington Post* and the author of four books, including *What to Do with Your Money When a Crisis Hits* and *The 21-Day Financial Fast.* Singletary frequently appears on national TV and radio programs, including NBC's *Today Show,* ABC's *Good Morning America,* CNN, and National Public Radio. She also hosted her own national TV show, *Singletary Says,* on TV One for two years. Singletary received the 2024 Best in Business Award for Commentary from the Society for Advancing Business Editing and Writing (SABEW) for a seven-part series on financial fraud. In 2023, she received the Legacy Award from the National Association of Black Journalists. In 2021, she won the Gerald Loeb Award for Commentary for a ten-part series on race and money. That series also earned the 2021 National Association of Black Journalists Award for Commentary. Singletary is the director of Prosperity Partners Ministry, a monthly personal finance program she started at her church. As part of this ministry, she and her husband also volunteer to teach financial literacy to incarcerated individuals in prisons across her home state of Maryland. Singletary earned a B.A. from the University of Maryland, College Park, and a M.B.M. from Johns Hopkins University. In 2024, she was inducted into the University of Maryland's Phillip Merrill College of Journalism Hall of Fame.

Honorable Thomas Suozzi

Congressman Tom Suozzi, U.S. Representative for New York's Third Congressional District, trained as an attorney and CPA and serves on the Ways and Means Committee. He also serves on the Subcommittees on Oversight and on Tax. He is the Democratic Co-Chair of the Problem Solvers Caucus, a bipartisan group of lawmakers committed to finding common ground on complicated issues. Additionally, he serves as Co-Chair of the bipartisan SALT Caucus and Co-Chair of the Democrats for Border Security Task Force. Now in his fifth term in Congress, Suozzi is focused on ways to heal the partisan divide, solve the immigration and border security crisis, and assist America's middle class and those aspiring to the middle class. Suozzi's public service began over 30 years ago, as mayor of his hometown of Glen Cove from 1994-2001 where he led a revitalization of the city, its waterfront, downtown, and municipal buildings. He then served as Nassau County Executive from 2002-2009 and is credited with the remarkable economic turnaround the County experienced under his leadership. Prior to his public service, Congressman Suozzi was an auditor with Arthur Andersen, a law clerk to the Chief Judge of the Eastern District of New York, and a litigator at Sherman & Sherling. He also served as an investment banker with Lazard after his time as County Executive.

Todd Tauzer

Todd Tauzer is a Senior Vice President and Actuary at Segal. He has over 15 years of public plan experience, specializing in public pension funding, risk management, and plan sustainability. He consults with major city, county, and state retirement systems. Tauzer came to Segal as Director of Municipal Pensions from S&P Global Ratings, where he helped develop a detailed framework to evaluate the sustainability and security of public pension and OPEB plans across the country. Prior to S&P, he was a senior pension actuary for CalPERS where he led the development of a system risk-mitigation policy that earned the 2016 Award for Excellence in Government Finance from the Government Finance Officers Association (GFOA). He is a Fellow of the Society of Actuaries, a Chartered Enterprise Risk Analyst, a Fellow of the Conference of Consulting Actuaries (CCA), and a member of the American Academy of Actuaries. He is a current member of the Committee on Retirement and Benefits Administration for GFOA and on the National Association of State Retirement Administrator's Executive Advisory Committee. He serves as the Chair of the Board of the California Society of Municipal Analysts and is a member of the University of the Pacific's Advisory Board, the California Actuarial Advisory Panel, and the California State Auditor's High Risk Advisory Team for Local Governments. He earned a B.S. in mathematics, a B.A. in economics, and a minor in Chinese from the University of California, Davis.

Christian Weller

Christian Weller is chair of the professor of public policy and department at the University of Massachusetts Boston, where he has served since 2007 and helped build and grow the department and its programs. His research centers on wealth inequality, retirement savings policy, and economic policy. He is widely published in peer-reviewed journals, books, and outlets such as *USA Today,* the *New York Times, Forbes,* and regional newspapers. He also regularly produces policy reports and issue briefs with Washington, DC-based think tanks. Weller holds a Ph.D. in economics from the University of Massachusetts Amherst.

2026 NIRS Members

Leadership Members

Council of Institutional Investors

National Association of State Retirement Administrators

National Conference on Public Employee Retirement Systems

National Council on Teacher Retirement

Visionary Circle

AARP

Aon

Bernstein Litowitz Berger & Grossman, LLP

BlackRock

CalPERS

CalSTRS

Cheiron

Colorado PERA

Employees Retirement System of Texas

Fairfax County Retirement Systems

Florida Public Pension Trustees Association

IAM National Benefit Funds

Kentucky Teachers' Retirement System

Linea Solutions

New York City Board of Education Retirement System

New York State Teachers' Retirement System

Ohio Public Employees Retirement System

Public Safety Personnel Retirement System of Arizona

San Bernardino County Employees' Retirement Association

Segal Company

South Dakota Retirement System

State Retirement and Pension System of Maryland

State of Wisconsin Investment Board

Teacher Retirement System of Texas

Teachers' Retirement System of Oklahoma

West Virginia Consolidated Public Retirement Board

Wisconsin Department of Employee Trust Funds

Director Circle

AFSCME

International Association of Fire Fighters

National Education Association

Educational Sustainers

American Federation of Teachers

ABL Technologies, LLC

Baillie Gifford International, LLC

Berman Tabacco

The Berwyn Group

Bolton, Inc.

California Retired Teachers Association

California Teachers Association

Cavanaugh Macdonald Consulting

Club Vita

CORPaTH

Employee Benefits Research Institute (EBRI)

Gabriel Roeder Smith and Company

Gallagher

Georgia Association of Public Pension Trustees

Groom Law Group

Illinois Public Pension Fund Association

International Foundation of Employee Benefit Plans (IFEBP)

Labaton Keller Sucharow

Lazard Asset Management

Majesco

Mass Retirees Association

New Jersey Education Association

NEA-Alaska

North Carolina Retired Governmental Employees' Association

October Three

Ohio Education Association

Pennsylvania State Education Association

SACRS

Tegrit Group

TELUS Health

Texas Association of Public Employees Retirement System

Texas Retired Teachers Association

Associate Members

Arkansas Local Police and Fire Retirement System

Arkansas Public Employees Retirement System

Arlington County Employees' Retirement System

Chicago Teachers' Pension Fund

Contra Costa County Employees' Retirement Association

Delaware Public Employees' Retirement System

El Paso Firemen & Policemen's Pension Fund

Employees' Retirement Fund of the City of Dallas

Employees' Retirement System of Rhode Island

Employees' Retirement System of the State of Hawaii

Fire & Police Pension Association of Colorado

Houston Firefighters' Relief and Retirement Fund

Illinois Municipal Retirement Fund

Indiana Public Retirement System

Iowa Public Employees' Retirement System

Kansas City Public School Retirement System

Kansas Public Employees Retirement System

Kentucky Retirement Systems

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

Massachusetts Teachers' Retirement System

Michigan Office of Retirement Services

Minnesota State Board of Investment

Minnesota State Retirement Systems

Mississippi Public Employees Retirement System

Missouri Local Government Employees Retirement System (LAGERS)

MoDot and Patrol Employees' Retirement System

Montana Teachers' Retirement System

Municipal Employees' Retirement System of Michigan

New Hampshire Retirement System

New Mexico Educational Retirement Board

New York City Employees' Retirement System

New York City Fire Pension Fund

New York State and Local Retirement System

North Dakota Public Employees Retirement System

North Dakota Retirement and Investment Office

Oklahoma Municipal Retirement Fund

Orange County Employees Retirement System

Pennsylvania Public School Employees' Retirement System

Pennsylvania State Employees Retirement System

Public Employee Benefits Authority of South Carolina

Public Employees Retirement Association of Minnesota

Public Employees Retirement Association of New Mexico

Public Employee Retirement System of Idaho

Public Employees' Retirement System of Nevada

Public School Retirement System of Missouri

San Antonio Fire & Police Pension Fund

San Diego City Employees' Retirement System

School Employees Retirement System of Ohio

Sonoma County Employees' Retirement Association

State Teachers Retirement System of Ohio

Teachers Retirement Association of Minnesota

Teachers Retirement System of Georgia

Teachers' Retirement System of Illinois

Teachers' Retirement System of Louisiana

Teachers' Retirement System of New York City

Tennessee Consolidated Retirement System

The Educational Employees' Supplementary Retirement System of Fairfax County

Utah Retirement System

Vermont State Treasurer's Office

Virginia Retirement System

Wyoming Retirement System

Board of Directors

Kelly Fox
NIRS Board Chair
Division Chief | CalPERS Investment Relations
CalPERS

Michael Hairston
NIRS Board Vice-Chair
Senior Pension Specialist
National Education Association

Angela Miller-May
NIRS Board Secretary-Treasurer
Chief Investment Officer
Illinois Municipal Retirement Fund

John Adler
Chief ESG Officer, Bureau of Asset Management
Office of New York City Comptroller

Dana Bilyeu
Executive Director
National Association of State Retirement Administrators

Alfred Campos
Director
NRTA: AARP's Retired Educator Community

Katie Comstock
Partner, Public Sector Solutions Lead
Aon

R. Dean Kenderdine
Executive Director
National Council on Teacher Retirement

Hank H. Kim, Esq.
Executive Director and Counsel
National Conference on Public Employee Retirement Systems

Kevin Lindahl
Executive Director
Fire and Police Pension Association of Colorado

Jill Schurtz
Executive Director and Chief Investment Officer
Minnesota State Board of Investment

Andrew Sherman
Senior Vice President, National Director of Public Sector Market
Segal

National Institute on Retirement Security

Reliable Research. Sensible Solutions.

The National Institute on Retirement Security is a not-for-profit organization established to contribute to informed policymaking by fostering a deep understanding of the value of retirement security to employees, employers, and the economy through national research and education programs. Located in Washington, D.C., NIRS has a diverse membership of organizations interested in retirement security including financial services firms, retirement plan sponsors and service providers, and trade associations among others.

1612 K Street, N.W., Suite 500
Washington, DC 20006
202-457-8190 | www.nirsonline.org
@NIRSonline

Check out the new NIRS website!

#SecuringRetirement2026