



Intersection of Student Loans and Retirement Savings Summit

Presented by The ERISA Industry Committee

Tuesday, October 18, 2016

Russell Senate Office Building—Room 385

The ERISA Industry Committee (ERIC) is the only national association that advocates for large employers on health, retirement and compensation public policies at the federal, state and local levels.

Does student loan debt impact retirement savings? This symposium will focus on how student loans and retirement savings intersect; how employers are assisting employees with student loans; and legislative proposals.

3:00-3:10 p.m. *Introduction & Welcome*

Annette Guarisco Fildes, President and CEO, ERIC

3:10-3:45 p.m. *Panel 1: Do Student Loans Impact Retirement Savings?*

Experts will present data that describes how retirement savings in America has been impacted by student loan debt. The data will describe the level of uncertainty Americans have with their retirement savings and the lack of savings due to student loan debt.

Moderated by: **Dr. Annamaria Lusardi**, Professor, The George Washington University

Ashwini (Asha) Srikantiah, Director of Design Thinking and Innovation, Fidelity Investments

Kent Allison, Partner, PricewaterhouseCoopers LLP

Rob Austin, Director of Retirement Research, Aon Hewitt

3:45-4:25 p.m. *Panel 2: How are Employers Assisting Employees with Student Loans?*

Large Employers have recently implemented programs to assist employees with repaying student loans. Representatives from a number of employers will provide information on the programs they provide and the reasons why they chose to offer these programs.

Moderated by: **Will Hansen**, Senior Vice President of Retirement Policy, ERIC

Cindy Silva, Director of Employee Benefits, Fidelity Investments

Erik Sossa, VP Global Benefits and Wellness, PepsiCo, Inc.

Barbara Brickmeier, VP Benefits and HR Business Development, IBM

Jaime Erickson, Executive Director Retirement & Financial Wellness, Comcast NBCUniversal

4:25-5:00 p.m. *Panel 3: What are the Latest Legislative Proposals?**

Legislators have proposed various policies to assist individuals in repaying student loans. This panel will focus on those proposals that employers could implement to assist their employees in paying down student loan debt and focus on retirement savings.

Moderated by: **Jim Brandell**, Government Policy Advisor, Dykema

Jon Abdnor, Legislative Assistant, Office of U.S. Senator John Thune

Lauren Marshall, Legislative Aide, Office of U.S. Senator Mark R. Warner (D-VA)

Kara Getz, Tax Counsel, U.S. Senate Finance Committee (Minority)

**Other Panelists May Be Added*

RSVP to memberservices@eric.org. Include your name, title, and office. For more information visit www.eric.org.

***This event has been structured to comply with House and Senate gift rules. Cookies and coffee will be served.*