

**2024 ERIC Spring Policy Conference**

**Wednesday, April 17**

12:00 p.m. – 7:00 p.m.

11:30 a.m. – 12:30 p.m. **Registration Opens & Lunch**

12:30 p.m. – 12:45 p.m. **Chairman’s Welcome**

Chairman Joe Pitra of ERIC’s Board of Directors will start the conference with opening remarks.

12:45 p.m. – 1:45 p.m. **Innovation Corner: AI in Retirement Policy and Financial Wellness**

Long on the horizon, artificial intelligence has burst into the mainstream. Innovation is already helping retirement savers achieve better outcomes. However, policymakers are grappling with both the opportunities and challenges these technologies pose. How can technology improve financial security? What role do employers play, and what risks should they consider? What cutting-edge capabilities might be created in the near future? Join us for a conversation about how AI is already used in employee benefits, and how regulation might change the future landscape.

Moderator: Alberto Rossi, Visiting Fellow, The Brookings Institution, Hachigian Family Professor of Finance, Director of the AI, Analytics, and Future of Work Initiative at the McDonough School of Business, Georgetown University

Panelists:

Esti Buskin, Head of Retirement Marketing, Nuveen

Dennis Elliott, Head of Product and Platforms, Retirement Plan Services, T. Rowe Price

Megan Yost, Senior Vice President, Engagement Strategist, Segal Benz

1:45 p.m. – 2:45 p.m. **ERISA Preemption at 50: Evolving Threats to Health Benefit Uniformity**

Despite the vital role it has played over the last fifty years in securing employee benefits for millions of Americans, the Employee Retirement Income Security Act (ERISA) remains under assault by misguided policies that continue to chip away at the critical protections that this landmark law has long provided. While state lawmakers attempt to expand their authority to control the design and administration of employer plans governed by federal law, there is a growing battle in state legislatures, regulatory agencies, and courtrooms across the country to defend the core tenets of ERISA preemption.

Join our panel of policy experts for an engaging discussion on modern threats to ERISA preemption in the health care context, the forces at play in this fight, and the proactive steps the business community can take, and are taking, to uphold this critical federal law.

Moderator: Alden Bianchi, Counsel, McDermott, Will & Emery LLP

Panelists:

Karen van Caulil, President and CEO, Florida Alliance for Healthcare Value

Laura Hobbs, Director of Health Care Policy, American Action Forum

CJ Mahler, Professional Staff Member, House Education and the Workforce Committee, Majority Staff

2:50 p.m. to 3:10 p.m. **Break**

3:10 p.m. – 3:30 p.m. **An Update on ERIC’s Campaign “Addressing Mental Health Disparity”**

Melissa Bartlett, ERIC’s Senior Vice President of Health Policy, will inform ERIC members on recent updates to our mental health parity campaign, “Addressing Mental Health Disparity.”

3:30 p.m. – 4:00 p.m. **Keynote Address from Chair Virginia Foxx, Ph.D. (R-NC)**

Dr. Virginia Foxx is the Chair of the House Education and the Workforce Committee and is an influential advocate on issues affecting employers that sponsor benefit plans for their employees. She will speak about her priorities in retirement and health policy, and the importance of ERISA.

4:00 p.m. – 4:30 p.m. **A Conversation with Mark Cuban**

ERIC will host a discussion with Cuban, where he will give his patently frank assessment of the state of the industry, the likelihood of disruption, his lessons learned from the business launch, and what the future may hold for drug benefits in the U.S.

4:30 p.m. – 5:15 p.m. **Spilling the Tea with Congressional Health Staff**

The 118th Congress spent much of 2023 debating health policy. From hot topics such as mental health, insulin caps, health price transparency, and pharmacy benefit manager reform, Congress has delved deep into many issues of great importance to plan sponsors. And these debates have continued into 2024.

Join us for this off-the-record conversation as Capitol Hill health policy staff from both sides of the aisle share the latest forecast for Congressional action on health policies impacting ERIC member companies.

Moderator: Robert Kennedy, Senior Vice President, Fidelity Investments

Panelists:

Amy Hall, Staff Director, Democratic for House Ways and Means Committee

Carrie Hughes, Health and Human Services Director, House Education and the Workforce Committee, Minority Staff

Mary Moody, Health Policy Director, Republican, Senate Health, Education, Labor and Pensions Committee

Conor Sheehey, Senior Advisor, Health Policy, Senate Finance Committee Minority

5:15 p.m.

**Reception**

**Thursday, April 18**

8:00 a.m. – 2:00 p.m.

8:00 a.m.           **Breakfast Starts**

8:10 a.m. – 8:15 a.m.   **Welcome & Introduction**

8:15 a.m. – 9:00 a.m.   **That Can't be Right? Solutions to Address "Dishonest" Billing Practices**

Anticompetitive billing practices for far too long have encouraged and enabled hospitals to increase patients' and employers' health care costs. This includes practices like "dishonest billing" - when hospital systems depict health services delivered in physician offices as higher-cost "hospital" services. Congress is slowly considering proposals to address these billing issues, however, significant work remains to deliver on the promise of site-neutral payment policies for patients and employers.

Experts will discuss what lies ahead to curb these practices once and for all.

Moderator:

James Stursberg, Senior Director, Congressional Affairs, Elevance Health

Panelists:

Benedic Ippolito, Senior Fellow, American Enterprise Institute (AEI)

Jasmine Masand, Health Policy Advisor, Senator Maggie Hassan (D-NH)

Lezah Calvin, Senior Manager of Federal Affairs, US of Care

9:00 a.m. – 9:05 a.m.   **5 Minute Break**

9:05 a.m. – 9:25 a.m.   **A Fireside Chat with Senator Roger Marshall, M.D.**

Senator Roger Marshall is a member of the Senate Health, Education, Labor, and Pensions Committee and Budget Committee. "Doc" Marshall is also served in the Army Reserves and a licensed OB/GYN. The Senator and ERIC's policy team will hold a discussion on health and retirement policies impacting employer plans.

9:25 a.m. – 9:55 a.m. **A Fireside Chat with Helen Morrison**

Helen Morrison is the Benefits Tax Counsel at the U.S. Department of the Treasury. She directs the activities of the attorneys, accountants, and actuaries who develop and review policy, legislation, regulations, and revenue rulings dealing with all aspects of employee benefits taxation and related matters. Ms. Morrison and ERIC’s policy team will discuss health and retirement policies impacting employer plans now and into the future.

9:55 a.m. – 10:00 a.m. **Break**

10 a.m. – 11:15 a.m. **From Many, One: How Best to Harmonize Today’s Paid Leave Patchwork**

Paid leave continues to be a top priority for state and local lawmakers in 2024, signaling that the patchwork of state and local laws that multistate employers must face will continue to expand. At the same time, renewed federal interest in bipartisan paid leave policy and a growing appreciation for employer-provided benefits has led to significant breakthroughs in recent months. With a key seat at the table, ERIC must now help lawmakers navigate the range of emerging policy paths that could finally provide employers with needed relief.

Join our exciting panel discussion on where national paid leave trends are headed, how focus on the Hill has shifted, and the range of creative policy options now on the table.

Moderator: Rich Glass, J.D., CEBS, Principal, Law & Policy Group, Mercer Health & Benefits, LLC

Panelists:

Rachel Greszler, Senior Research Fellow, Workplace and Public Finance, Roe Institute, The Heritage Foundation

Jesse Matton, National Partnership for Women and Families

Joshua Seidman, Seyfarth Shaw LLP

11:15 a.m. – 12:00 p.m. **Lunch**

12:00 p.m. – 12:30 p.m. **The Fate of Chevron Deference and the Future of Benefits Regulation**

Under the Supreme Court's 1984 decision in *Chevron U.S.A., Inc. v. Natural Resources Defense Council, Inc.*, courts must uphold a regulation embodying a federal agency's interpretation of a statutory ambiguity if the agency's interpretation is permissible, even if the court would otherwise interpret the statute differently. This year, the Supreme Court will decide whether to abandon or severely limit this so-called "Chevron deference." Overturning Chevron would have profound consequences for all of Administrative Law, potentially including the regulation of employee benefit plans.

Moderator: Tom Christina, Executive Director, The ERIC Legal Center

Panelists:

Michael Kenneally, Partner, Morgan Lewis

12:30 p.m. – 1:30 p.m. **Beyond SECURE 2.0: Retirement Policy Update from the Hill**

As regulators implement the SECURE 2.0 Act, legislators continue to explore solutions to expand coverage, reduce costs, and shape the investments that Americans use to save for retirement. While Congress debates the Department of Labor's fiduciary regulation and investment standards, policymakers are also studying areas that could see bipartisan agreement, such as enhancements to SECURE 2.0, efforts to shore up the defined benefit system, and changes to streamline plan administration. With the presidential election looming, what oversight and policy issues could see congressional activity? Which issues are on the table this year, and which might wait until 2025 or beyond?

This panel will include key congressional staffers who will discuss retirement priorities and predictions for 2024 and beyond.

Moderator: Marc Gerson, Member, Miller & Chevalier

Panelists:

Rico Doss, Economic Policy Advisor, Rep. Frederica Wilson (D-FL)

Paul Lapointe, Legislative Assistant, Sen. Tim Kaine (D-VA)

Payson Peabody, Retirement Tax Counsel, House Ways and Means  
Committee Majority

Michael Sinacore, Pensions Policy Director, Senate Health, Education,  
Labor and Pensions Committee Minority Staff

1:30 p.m. – 1:45 p.m. **Raffle & Closing Remarks**

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