

2025 ERIC Spring Policy Conference

Wednesday, March 26

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

Jeni Chih of ERIC's Board of Directors will start the conference with opening remarks.

12:45 p.m. – 1:15 p.m. On the Frontlines of Legislation: Remarks and Q&A with Congresswoman Erin Houchin

Congresswoman Erin Houchin (R-IN-9) will be kicking off the 2025 Spring Policy Conference with remarks on her congressional policy priorities related to employee benefits, and will sit down with ERIC's Andy Banducci and Melissa Bartlett for a conversation. Rep. Houchin will address key health and retirement policy issues, including pharmacy benefit manager transparency and reform, first-dollar coverage of telehealth, defending health and retirement savings tax incentives, and more.

1:15 p.m. – 2:15 p.m. How will the Trump Administration Approach Benefits Policy?

As the Trump Administration nears its 100th day in office, understanding its approach to employee benefits is crucial for businesses, policymakers, and workers alike. This panel will feature perspectives from officials and commentators on likely changes to health care, retirement, paid leave, and other relevant policies. Experts will discuss proposals such as altering tax incentives for employee benefits, and new regulations (or deregulation!) that would affect employee benefits. ERIC members will gain insights into the new administration's priorities and plans, and how ERIC and our members can navigate and adapt to potential policy shifts.

Moderator: Alice Joe, Vice President, Federal Government Relations, Fidelity Investments and Former Deputy Assistant Secretary for Policy, Employee Benefits Security Administration, U.S. Department of Labor

Eric Hargan, Founder & CEO, The Hargan Group, Former Deputy Secretary, U.S. Department of Health and Human Services

Gordon Hartogensis, Former Director of the Pension Benefit Guaranty Corporation

Preston Rutledge, Former Assistant Secretary of Labor at the Department of Labor's Employee Benefits Security Administration

2:15 – 3:15 p.m. Retirement Policy in a New Washington: Can the Bipartisanship Continue?

Retirement policy has typically remained a bastion of bipartisanship, but will that historical trend continue in the 119th Congress? Retirement policy has been discussed in the context of tax reform, environmental and social policy, and even national security, and it's possible that retirement policy could be swept up in the fray. What are the priorities for key policymakers? What legislative threats and opportunities does the retirement community have in the coming year? And just how likely is change? Join our panel of experts from Capitol Hill to discuss the legislative landscape in the new Congress.

Moderator: Aliya Robinson, Director of Congressional Affairs, T. Rowe Price

Cyrus Artz, Senior Policy Adviser, Speaker of the House Mike Johnson (R-LA-4)

Drew Crouch, Senior Tax Counsel, Tax and ERISA, Senate Finance Committee

Kevin McDermott, Labor Policy Director, House Education and Workforce Committee

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

3:15 – 3:30 p.m. **Break**

3:30 – 3:45 p.m. **Networking Activity**

3:45 – 4:00 p.m. **Member Exercise**

4:00 – 4:30 p.m. **Navigating the Future of Health Care with Congressman Buddy Carter**

Listen in on a “fireside chat” with Congressman Buddy Carter (R-GA-1) to hear more about his agenda as chair of the Energy and Commerce Subcommittee on Health. With a background in pharmacy, Congressman Carter will discuss key health policy issues impacting employer-sponsored benefits plans, including PBM reform and drug prices, transparency, health care competition, and more.

4:30 – 5:00 p.m. **Gene Scalia: A Fireside Chat on His DOL Legacy and Legal Practice**

Join us for an insightful chat with the Honorable Gene Scalia, former U.S. Secretary of Labor, as he reflects on his impactful tenure at the Department of Labor (DOL) and his current work as a prominent attorney at Gibson Dunn. Secretary Scalia will share his experiences in shaping labor policy, tackling regulatory challenges, and advocating for workers and employers alike. He'll also discuss the Department of Labor in the new Trump Administration, and how employers and groups like ERIC can best work with them to achieve success. Secretary Scalia will also provide an update on ERIC's mental health parity litigation, in which he is lead counsel.

5:00 p.m. **Reception**

Thursday, March 27
8:00 a.m. – 3:15 p.m.

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

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

8:15 a.m. – 8:25 a.m. **Update from AI Task Force Chair Jason Kanter, IBM Corporation**

8:25 a.m. – 9:15 a.m. **AI Powered Benefits: Disrupting the Status Quo or Enhancing Employee Benefits? Navigating the Future of AI Trends Impacting Employee Benefits, Legislative Frameworks, and Agency Engagement**

As Artificial Intelligence (AI) becomes ever present in modern workplaces and benefits departments, understanding the legal and regulatory frameworks surrounding its use is more critical than ever. This panel will delve into the latest trends in AI adoption, specifically examining its impact on employee benefits, and compliance requirements. Experts will explore how federal, and state laws are evolving to address AI-related challenges, from privacy concerns to ethical considerations, and how regulatory agencies are shaping policy. Attendees will gain valuable insights into the current AI landscape, the potential for future legislation, and the role of regulators in this new AI age.

Moderator: Michael Shea, Chief Information Officer, McDermott Will & Emery LLP

Brittany Brignac, Legislative Counsel, Senator Mike Rounds (R-SD)

Brandon Rees, Deputy Director of Corporations and Capital Markets, AFL-CIO

John Quinn, Legislative Director, Congressman David Schweikert (R-AZ-1)

9:15 a.m. - 10:15 a.m. **Health Policy in 2025: Major Battles and Opportunities Incoming**

As the 119th Congress inherits a great deal of unfinished business from the last Congress and is thrust into the challenge of offsetting costs related to significant new tax legislation, health policy is set to be a major focus and flashpoint this year. This panel will examine key health policies and legislative efforts likely to be addressed by the current Congress, offering insights into what may lie ahead for the rest of the year. Capitol Hill staff will share their perspective and help ERIC members gain a deeper understanding of the current state of play, the obstacles that lawmakers face, and the potential pathways for change that will directly affect employee benefit plans.

Moderator: Julia Zuckerman, Vice President & Senior Consultant, Compliance, Segal

Lizzy Burke, Legislative Assistant, Senate Minority Leader Chuck Schumer (D-NY)

CJ Mahler, Professional Staff Member, House Committee on Education and Workforce

Anna Rose Moore, Senate Health, Health, Education, Labor and Pensions Committee

Dominique Yelinski, Policy Advisor, Majority Leader Steve Scalise (R-LA-1)

10:15 a.m. – 10:30 a.m. **Break**

10:30 a.m. – 11 a.m. **Settling the Score with Congressional Budget Office Director Phillip Swagel**

Join us for a fireside chat with the Director of the Congressional Budget Office (CBO) Phillip Swagel. During this candid conversation, we'll discuss the CBO's critical work related to the budget reconciliation process and its effect on federal retirement and health care legislation. Listen in to learn more about how CBO analyzes economic and budgetary issues to help Congress make decisions impacting employee benefits.

11:00 a.m. – 12:00 p.m. **Policy Bottlenecks Restricting Access to Health Care**

While the COVID era highlighted severe health care provider shortages across the country, Americans continue to face a deficit of physicians and medical professionals to whom they can turn for care. Employee benefits plans have fewer and fewer options to provide care for their workforces. Meanwhile, many state policies currently in effect make these problems worse by creating geographic restrictions on medical services, requiring certificates of public need to create or expand sites of care, and otherwise applying arbitrary standards to medical providers. Join our panel of policy experts, employers, and advocates for an in-depth discussion of key policies that drive up prices and limit public access to health care services.

Moderator: Dillon Clair; Advisory Council member

Lisa M. Gables, CPA, CEO, American Academy of Physician Associates (AAPA) and Founder, HealthFORCE

Professor Thomas Stratmann, Distinguished University Professor, George Mason University

Jessica Rhoades, Head of State Health Care Policy, Amazon

12:00 p.m. – 1:00 p.m. **Lunch**

1:00 p.m. - 1:30 p.m. **A New Era at the Department of Labor with Keith Sonderling, Deputy Secretary of Labor**

Join this intimate conversation on the current and future opportunities the Department of Labor (DOL) faces where Deputy Secretary Sonderling will offer a unique perspective on the policies that impact both employers and employees. Members will have an opportunity to participate in a lively Q&A to address pressing questions about the future of employee benefits at the DOL.

1:30 p.m. – 2:30 p.m. **Reining In the Administrative Agencies—An Interim Report**

In Washington, D.C., there is a new President, a new Congress, and a new relationship between the administrative state and regulated communities. Commentators shared many predictions about the far-reaching effects of the Supreme Court's decision in *Loper Bright* on the agencies and

rulemaking, but have they come true? What practical effects, if any, have we observed since the elimination of *Chevron* deference? How might the Trump administration's Office of Management and Budget approach regulation in this new world? What early returns do we have from the courts, and what might the benefits community see next? Join our panel of experts to take stock of the recent changes to the administrative state.

Moderator: Tom Christina, Executive Director, ERIC Legal Center

Carly E. Grey, Shareholder, Ogletree Deakins

Markus Stevenson, Senior Counsel, Employment Law, Chevron

Kevin L. Walsh, Principal, Groom Law Group

2:30 p.m. – 2:45 p.m. **Raffle & Closing Remarks**

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