

2024 ERIC Fall Virtual Policy Conference

Tuesday, September 24

11:00 a.m. – 4:40 p.m. (ET)

11:00 – 11:07 a.m.

Welcome Annual Members' Meeting

Chairman Joe Pitra of ERIC's Board of Directors

11:07 a.m. – 11:30 a.m.

A Fireside Chat with Congresswoman Stephanie Bice (R-OK)

Introduced by Chairman Joe Pitra

11:30 a.m. – 12:30 p.m.

Batten Down the Hatches: Where Might the Plaintiffs' Bar Strike Next?

Plan sponsors continue to face the ever-growing attacks by the plaintiff's bar – with more class actions expected in short order. Most recently, plaintiffs appear to attack the ability of plan sponsors to engage in pension risk transfers, choose widely available and respected target date funds for their 401(k) menu, or challenge the regulatory framework for health care and disability benefit determinations. Companies need to strategically analyze these suits and guess which fights the plaintiffs' bar might initiate next. Join this panel of legal experts who will brainstorm and provide practical guidance to help keep your company out of the crosshairs of the next wave.

Moderator: Glenn Butash, Managing Counsel, U.S. Compensation & Benefits, Nokia

Panelists:

Andrew Liazos, Partner, McDermott Will and Emery

Joanne Roskey, Member, Miller & Chevalier

Vicki Blanton, Assistant Vice President, Senior Legal Counsel, Tax & Benefits, AT&T

1:30 – 2:30 p.m.

New Glitches in the Matrix: State AI Policies and Their Impact on Benefits Administration

As the capabilities and applications of artificial intelligence in the employee benefits world continue to grow exponentially, public policy in this evolving technology space continues to play catch-up. In the absence of federal proposals, many state lawmakers have drawn attention to emerging problems associated with AI, resulting in bold debates on issues from data privacy and disclosure to the very design, development, and use of AI systems. Do these state policies protect employees, or stand in the way of plan innovation? Join our panel of

policy and benefits experts for an exciting discussion of where state AI policy stands and what employers can do to prepare and adapt for the realities ahead!

Moderator: Stephanie Beers, Microsoft

Panelists:

Kara Gainer, Walmart

Jess Kirchner, NGA, Senior Policy Analyst, Center for Best Practices

Ryan Blaney, Partner, Jones Day

2:30 – 3:00 p.m.

Congressman Tim Walberg (R-MI)

Introduced by Drew Clark, Vice President and General Counsel, McKee Foods

3:30 – 4:30 p.m.

ERISA at 50: How Might Retirement Policy Change?

The fiftieth anniversary of the Employee Retirement Income Security Act is a time to reflect on how the retirement industry has changed since 1974. The relationship between employers and workers, access to information, financial sophistication, and risk appetite have all evolved. What trends might characterize the next fifty years of employer-provided retirement savings? How do they compare to the changes we saw in the last fifty? Our panel of experts will share their insights and predictions.

Moderator: Chris Spence, Managing Director, Head of Federal Government Relations, TIAA

Panelists:

Andrew Biggs, Senior Fellow, American Enterprise Institute (AEI)

Bruce Cadenhead, Partner, Global Chief Actuary - Wealth, Mercer

Emerson Sprick, Associate Director, Economic Policy Program, Bipartisan Policy Center

4:30 - 4:40 p.m.

Raffle

Wednesday, September 25
11:00 a.m. – 4:00 p.m. (ET)

11:00 a.m. – 12:00 p.m.

Pill Popping Prices: How to Make Medications More Affordable and Accessible

Employers want their employees to have access to high quality, affordable health coverage. Prescription drug costs in the U.S. represent the single fastest-growing component of health care costs for employers and the workers for whom they provide coverage. Our current system is unsustainable at all levels, and congressional action is necessary to help address this pressing problem. This panel will highlight policy solutions that may help lower prescription drug costs, increase access to biosimilars, drive more competition and choices through patent reforms, and more.

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

Panelists:

Rachel Goode, Senior Vice President, Legal and Intellectual Property, Biopharmaceuticals, Fresenius Kabi

Jack Hoadley, Research Professor Emeritus, McCourt School of Public Policy, Georgetown University

Max Seltzer, Health Policy Advisor, Senator Roger Marshall (R-KS)

Joe Shields, Managing Director, TransparencyRx

3:00 – 3:30 p.m.

Remarks From Dr. Bill Cassidy (R-LA)

Jeni Chih, ERIC Vice Chair and Senior Director, Global Health and Wellness, PepsiCo

3:30 – 4:30 p.m.

Tax Reform: What's Possible in 2025

With the expiration of various provisions of the Tax Cuts and Jobs Act at the end of the year, Republicans and Democrats beginning to plan for a 2025 tax reform debate. Tax preferences for employer-sponsored health insurance and retirement benefits are immensely popular -- yet changes to both could be under discussion. Will there be dramatic changes that reshape how Americans access health care and save for retirement? Join our panel of congressional staff who will be shaping the tax reform debate in the months to come.

Moderator: George Callas, Executive Vice President of Public Finance,
Arnold Ventures

Panelists:

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

Jamie Cummins, Senior Tax Counsel, Senate Finance Committee,
Minority Staff

Braden Murphy, Senior Policy Adviser, House Committee on the Budget,
Majority Staff

4:30 – 4:40 p.m.

Raffle

Thursday, September 26
11:00 a.m. – 4:00 p.m. (ET)

11:00 a.m. – 12:00 p.m.

Emergency Savings Programs: Data, Options, and Challenges

Popular media reports that many Americans do not have the financial wherewithal to navigate even an unexpected \$1,000 expense. Employers are rightly concerned about the effects of this financial insecurity on the workforce. That's why workplace savings programs have become increasingly popular. The SECURE 2.0 Act went a step further, creating the option for sponsors to establish a Pension-Linked Emergency Savings Accounts (PLESAs). What is the scale and scope of the emergency savings problem? What solutions exist, and how are they received in the workplace? And what technical issues must employers navigate to provide these programs? Join our panel of experts to discuss the state of emergency savings in the American workforce.

Moderator: Sarah Touzalin, Senior Counsel, Seyfarth Shaw LLP

Panelists:

Luke DeBoer, Manager, Financial Wellness, Delta Airlines, Inc.

Brian Gilmore, Vice President, Commonwealth

Emily Kolle, Fidelity Investments

12:00 – 12:10 p.m.

Formal Remarks from Congressman Bobby Scott (D-VA)

1:00 – 2:00 p.m.

Quiet Before the Storm: Understanding Election-Year State Political Landscapes

As an historic presidential election unfolds, fights for the control of state legislatures and executive mansions continue to ramp up across the country. Importantly, these races will set the stage for state policymaking in 2025 and shape the advocacy priorities of ERIC and likeminded organizations in the years to come. As state lawmakers polish policy positions and prepare for November, employers and stakeholders must look ahead and prepare themselves for the storm of state policy proposals that is likely to follow. Join our exciting panel discussion for expert insights on shifting state political landscapes, expected post-election trends, and how today's campaigns will shape tomorrow's state policy initiatives.

Moderator: Elizabeth Goldberg, Partner, Morgan Lewis

Panelists:

Tania Maestas, Deputy Director and General Counsel, Attorney General Alliance

Pennsylvania State Rep. Joseph D’Orsie

Texas State Rep. Dr. Tom Oliverson

Brooklyn Roberts, Senior Director, ALEC Health and Human Services Task Force

3:00 – 3:10 p.m.

CEO’s Remarks

3:10 – 4:10 p.m.

50 Years of ERISA and Changes to Health Policy

Employers can use price and quality information from across the continuum of health care stakeholders to change the incentives in the health care system for both patients and providers. However, this requires legislative and regulatory change. Join our panel of experts who will discuss what health policies can counter bad market behaviors and, their impact on employers and employees, and the challenges that lie ahead.

Moderator: Andy Chasin, Blue Shield of California

Panelists:

Erin Delaney, Director of Health Care Policy, Progressive Policy Institute

Eric Ueland, Visiting Fellow, Heritage Foundation, Public Advisor, Paragon Health Institute

Matt Fuentes, Legislative Assistant, Senate Majority Leader Chuck Schumer (D-NY)

4:10 p.m. – 4:20 p.m.

Raffle & Closing Remarks