

Speaker Bios

Andrew Biggs

Andrew G. Biggs is a senior fellow at the American Enterprise Institute (AEI), where he studies Social Security reform, state and local government pensions, and public sector pay and benefits.

Before joining AEI, Biggs was the principal deputy commissioner of the Social Security Administration (SSA), where he oversaw SSA's policy research efforts. In 2005, as an associate director of the White House National Economic Council, he worked on Social Security reform. In 2001, he joined the staff of the President's Commission to Strengthen Social Security.

Biggs has been interviewed on radio and television as an expert on retirement issues and on public vs. private sector compensation. He has published widely in academic publications as well as in daily newspapers such as The New York Times, The Wall Street Journal, and The Washington Post. He has also testified before Congress on numerous occasions. In 2013, the Society of Actuaries appointed Biggs co-vice chair of a blue ribbon panel tasked with analyzing the causes of underfunding in public pension plans and how governments can securely fund plans in the future. In 2014, Institutional Investor Magazine named him one of the 40 most influential people in the retirement world. In 2016, he was appointed by President Obama to be a member of the financial control board overseeing reforms to Puerto Rico's budget and the restructuring of the island's debts.

Biggs holds a bachelor's degree from Queen's University Belfast in Northern Ireland, master's degrees from Cambridge University and the University of London, and a PhD from the London School of Economics.

Rep. Vern Buchanan

U.S. Representative Vern Buchanan is co-chair of the bipartisan 30-member Florida congressional delegation and Vice Chair of the powerful House Ways and Means Committee, which has jurisdiction over tax policy, international trade, health care, welfare, Social Security and Medicare. Buchanan is the most senior Republican on the committee and currently serves as Chairman of the Health Subcommittee, a key panel that has broad jurisdiction over traditional Medicare, the Medicare prescription drug benefit and Medicare Advantage. The subcommittee also oversees issues relating to medical education, private health insurance programs and subsidies delivered through the tax code, consumer-directed health savings tools and issues related to the quality of and access to care.

Buchanan also serves as the Chairman of the House Democracy Partnership (HDP), a historically bipartisan, twenty-member commission of the U.S. House of Representatives that works directly with more than 20 partner countries around the world to support the development of effective, independent, and responsive legislatures.

A self-made businessman, Buchanan understands that America's economic strength flows from its entrepreneurial spirit and pro-growth, free-market policies. He currently sits on the prestigious Joint Committee on Taxation, a small group of the most senior tax-writers in Congress. Buchanan previously served as chairman of the Tax Policy Subcommittee and played a key role in passage of a sweeping tax cut bill. During the tax reform debate, he focused on lowering tax rates for individuals and small businesses and led

the Small Business and Passthroughs Working Group. He has worked to enact tax incentives to help small businesses, end burdensome regulations and limit frivolous lawsuits.

Since coming to Congress in 2007, Buchanan has had 29 of his legislative initiatives signed into law. These accomplishments include reforms to military training procedures, supporting our nation's veterans, confronting the drug epidemic, helping Americans save for retirement, strengthening Medicare, improving the U.S. foster care system and measures to stop animal cruelty.

Buchanan has also been ranked one of the most bipartisan and effective members of Congress by two respected non-partisan organizations: the Lugar Center and the Center for Effective Lawmaking. In 2020, the U.S. Chamber of Commerce also rated Congressman Vern Buchanan the highest among the 29-member Florida congressional delegation for his record of bipartisanship and creating jobs.

With 220,000 Medicare beneficiaries in Florida's 16th District, Buchanan is committed to preserving Medicare's long-term solvency for senior citizens, as well as bringing down the cost of health care for all Americans. Buchanan was awarded the "Champion for Healthy Seniors" award by a leading advocacy group for protecting Medicare and fighting for lower prescription drug costs. He will continue to be a strong advocate for protecting and strengthening Medicare for both today's seniors and future generations.

A strong fiscal conservative, the Congressman's signature bill is the Buchanan Balanced Budget Amendment Act. He also introduced legislation to stop automatic pay raises for Members of Congress until the budget is balanced. Balancing the budget is an urgent priority as the U.S. national debt has reached \$31 trillion and continues to grow.

Buchanan, who represents more than 70,000 veterans in Southwest Florida, has a strong record of fighting for veterans and military families. Last year, his measure to help veterans retain their valuable G.I. Bill credits was signed into law. Additionally, his legislation to reduce training accidents following the death of a Bradenton soldier became law as a part of a sweeping defense policy bill in 2021. In 2015, Buchanan's Veterans Identification Card Act, which allowed millions of veterans across the country to receive a free official identification card from the Dept. of Veterans Affairs was signed into law.

Buchanan grew up with five siblings in a blue-collar household in a small town near Detroit, Michigan. He served six years in the Air National Guard and worked his way through college. The self-made businessman is a respected leader in Florida's business community. Buchanan previously served as chairman of the Florida chapter of the Young Presidents' Organization, the Florida Chamber of Commerce and the Sarasota Chamber of Commerce. He was also a member of the Board of the U.S. Chamber and in 2005 he was inducted into the Tampa Bay Business Hall of Fame.

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In addition, Congressman Buchanan is a dedicated philanthropist. He has committed himself to diverse community causes, including the Boys and Girls Club, the Community Foundation of Sarasota County, the Walk to Cure Juvenile Diabetes, the American Heart Walk, the Mote Marine Laboratory and the Ringling Museum of Art.

A husband and father, Congressman Buchanan lives in Longboat Key, Florida with Sandy, his wife of more than 40 years. Vern and Sandy have two grown sons, James and Matt and nine grandchildren.

Tom Clark

Tom Clark - Tom Clark is a partner in the Boston and St. Louis offices of The Wagner Law Group, a certified woman-owned law firm specializing in ERISA and Employee Benefits. He also serves as the firm's chief operating officer. Tom's expertise encompasses all aspects of employee benefits including the design, implementation, and compliance of retirement plans, health and welfare plans, and executive and incentive compensation arrangements. He also has a robust practice assisting service providers such as investment advisors and third party administrators in meeting their ERISA compliance needs. Tom's vast litigation experience includes defending plan sponsors and service providers, and has included work on landmark ERISA cases such as *Tibble v. Edison*, which was decided by the U.S. Supreme Court. He also regularly defends ERISA fiduciaries against investigations by the Department of Labor and the Internal Revenue Service, and is often retained to assist in resolving prelitigation disputes, thus avoiding the cost and uncertainty of a court battle. Since 2021, Tom has been recognized annually by U.S. News & World Report in its publication of The Best Lawyers in America® in the area of Employee Benefits (ERISA) Law.

Tom has been quoted extensively as an ERISA and employee benefits expert by outlets such as Reuters, The Associated Press, Bloomberg, and Forbes. He regularly travels the country speaking to groups of up to 2,000 people about important ERISA and employee benefits topics. Since 2013, Tom has taught ERISA Fiduciary Law as an adjunct professor at his alma mater, The Washington University in St. Louis School of Law. In 2022, he also began teaching ERISA Regulation of Retirement Plans at Boston University School of Law.

Craig Copeland

Craig Copeland is the Director of Wealth Benefits Research with the Employee Benefit Research Institute (EBRI). He has been with EBRI since 1997. Dr. Copeland has authored or coauthored numerous studies on employee benefit topics ranging from participation in employment-based retirement plans, 401(k) plan participant behavior, policy impacts on retirement security, and the confidence of Americans in their retirement prospects to the types of financial wellbeing programs that employers offer. He leads EBRI's research on retirement security and financial wellbeing.

Dr. Copeland received his Ph.D. in economics from the University of Illinois at Urbana-Champaign. He previously taught economics at Southern Illinois University-Carbondale before joining EBRI.

Lisa Drake

Lisa Drake is a Managing Director, Retirement Plan Consulting based in SageView's Florida office, working closely with plan sponsor clients on plan design, investment due diligence, monitoring and reporting as well as ERISA compliance to maximize fiduciary protection for employers. She specializes in driving positive retirement plan outcomes and developing long-standing client relationships.

Lisa has worked in institutional financial services for over 15 years, beginning her career at Charles Schwab. She worked as a financial advisor at Ameriprise Financial Services and later transitioned to a relationship manager role with CBIZ before moving on to FiduciaryFirst.

She was named among NAPA's (National Association of Plan Advisors) Top Women Advisors in 2016-2018*

Lisa earned her Bachelor of Science in International Business and World Trade from the University of Buffalo and her MBA with a specialization in Human Resource Management from the University of Phoenix. She is an Accredited Investment Fiduciary (AIF®) and has earned her Certified Plan Fiduciary Advisor (CPFA) credential from the National Association of Plan Advisors. Lisa also holds the Certified Health Savings Adviser (CHSA) certification, helping provide a holistic consultative approach to employee benefits and retirement planning.

Shannon Finley

Shannon Finley is a founding partner of Capitol Counsel, LLC. She brings to the firm over two decades of experience in politics and strategy in Washington, D.C. Finley is known for her strategic counsel on issues ranging from tax to health and politics. Her client base cuts across industries and includes key trade associations, Fortune 100 corporations, non-profits and issue-based coalitions.

Tess Gee

Theresa (Tess) S. Gee is the Pension Rights Center's Legal Director and provides legal guidance and counsel on a broad range of pension issues. Previously, she served in multiple capacities with the U.S. Department of Labor Office of the Solicitor advising on matters involving the Employee Retirement Income Security Act of 1974, as amended, and was in private practice representing individuals and other clients in numerous ERISA and employee benefit matters.

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Kara Getz

Kara Getz is Chief Counsel for Ways & Means Ranking Member Richard E. Neal (D-MA). Prior to joining the Ways & Means Committee staff, Kara was Senior Tax Counsel for the Senate Finance Committee and Tax Counsel and Legislative Director for Congressman Neal. Kara also worked as Chief Counsel for the Senate Special Committee on Aging and Tax Counsel for Senator Gordon Smith. Her private sector experience includes working as the Director of Congressional Affairs for ASPPA and as a Senior Manager in the National Compensation and Benefits Group of Ernst & Young LLP's Human Capital practice.

Sen. Maggie Hassan

U.S. Senator Maggie Hassan is working across party lines to solve problems, expand opportunity for all hard-working families and small businesses, and keep New Hampshire and America safe, secure, and free. In 2016, she was elected to represent New Hampshire in the United States Senate, winning one of the most competitive Senate races in the country by 1,017 votes. Senator Hassan is only the second woman in American history to be elected as both Governor and Senator.

In the Senate, she is an independent leader focused on the priorities that matter to the people of New Hampshire, including lowering health care costs, combating the opioid crisis, strengthening the workforce, expanding access to broadband, cutting taxes for small businesses, addressing climate change, and keeping our country safe.

A recipient of the Bipartisan Policy Center's Legislative Action Award, Senator Hassan has teamed up with Republicans to propose dozens of bipartisan bills on issues ranging from tax cuts for innovators to clean energy to supporting veterans' transition to civilian life — many of which have already become law. Senator Hassan secured a ninefold increase in funding for the state to combat the opioid crisis and joined with Republicans to stop pharmacies from limiting access to lower cost generic prescription drugs. She partnered with Republican Senator Bill Cassidy of Louisiana to successfully pass into law a measure to help end the practice of surprise medical billing. The Senator has worked across party lines to provide funding to expand access to broadband in New Hampshire and ensure New Hampshire workers have the skills they need to compete in the 21st century economy.

Senator Hassan serves on the Homeland Security and Governmental Affairs Committee, chairing the subcommittee on Emerging Threats and Spending Oversight. As a member of the Committee, the Senator introduced and passed bipartisan legislation helping the Department of Homeland Security better identify terrorist threats. She also helped pass a bill to strengthen American cybersecurity by building stronger coordination between the federal government and the states and improving the country's ability to identify and stop cyberthreats. She is also a member of the Senate Committee on Health, Education, Labor, and Pensions (HELP), Senate Finance Committee, Senate Committee on Veterans' Affairs, and the Joint Economic Committee.

The Senator is part of the bipartisan Common Sense Coalition that was able to break the stalemate and help pass an additional bipartisan COVID-19

relief bill at the end of last year. That legislation helped secure billions of dollars for New Hampshire small businesses and families and saved thousands of jobs. The bipartisan group continues to meet to try to find a path forward on a number of critical priorities.

The Senator's decision to first run for office was inspired in large part by her advocacy to ensure that her son Ben, who experiences severe disabilities, and other kids like him would have the same opportunities as their peers.

Serving for three terms in the New Hampshire State Senate, as the 81st Governor of New Hampshire, and now as United States Senator, she has continued to fight to ensure that all Americans, regardless of personal circumstances, have the opportunity to succeed.

Senator Hassan earned her B.A. from Brown University and her J.D. from the Northeastern School of Law. She and her husband, Tom, an educator, are the proud parents of two children, Ben (33) and Meg (29).

Rep. Blake Moore

U.S. Representative Blake Moore currently serves as the first-ever Utah Republican on the House Ways and Means Committee, where he sits on the Health, Social Security, and Trade subcommittees. He also serves on the House Budget Committee to push for policies to reverse our national debt crisis and advocate for Utah's defense community. Congressman Moore continues to represent Hill Air Force Base as co-chair of the Armed Forces and Depot caucuses, and he was elected in November of 2023 to join the House leadership ranks as the Vice Chair of the House Republican Conference. He is the first Utahn to ever be elected to House or Senate leadership.

Before being elected to Congress, Representative Moore worked for small businesses and in the foreign service, experiences that now guide his work on domestic and foreign policy. As a Principal at Cicero Group, he worked primarily in the social impact, marketing research, and strategy practice areas leading projects and serving clients throughout Utah and the nation. He has expertise in education, financial services, public policy, healthcare, transportation, supply chain, and waste industries, and this work informs his customer service and problem solver approach in Washington, D.C., as he identifies ways to help the federal government better work for Northern Utah. His passion for helping organizations manage the change process drives his ambition to overcome partisan gridlock, improve federal agencies, and smartly streamline the nation's bureaucracy.

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Helen Morrison

Helen Morrison is the Deputy Benefits Tax Counsel for the Office of Tax Policy, Department of the Treasury. In that role, Helen oversees guidance and policy issues on all aspects of employee benefits, including retirement benefits, health and welfare benefits, executive compensation, and employment tax. Prior to joining the Department of the Treasury, Morrison was a Principal in the EY Washington National Tax Practice and prior to that a Partner with McDermott, Will & Emery. She earned her bachelor's degree from Trinity College, Hartford, Connecticut, and her JD from Illinois Institute of Technology/Chicago-Kent College of Law. She served as a law clerk to the Honorable Hector M. Laffitte of the U.S. District Court in San Juan, Puerto Rico, from 1985–87.

Michelle Neblett

Michelle Neblett is an accomplished public policy and government affairs professional, with 20 years' experience as a registered federal lobbyist for a large company and two national trade associations, and on Capitol Hill as a committee staffer. She is known for collaborating with colleagues to accomplish our goals, utilizing the multiple resources available to create an effective story and advocacy plan, and then executing successfully with proven bipartisan legislative and regulatory results. She has worked in agriculture for ranchers and beef producers, the restaurant industry for operators of mom-and-pop to very large businesses, employers of all sizes and industries sponsoring health and retirement benefits for their employees, and The Boeing Company. Most recently, her roles have focused on employer-sponsored health care and health tax policy, but also has experience in tax, retirement, international trade, labor & workforce, biofuels, and commercial aviation policy. She is battle-tested, having been part of multiple teams charged with responding to crises. She is a passionate advocate for the people and issues she represents, and enjoys accomplishing changes to federal law that impact others' everyday lives.

Rep. Jimmy Panetta

U.S. Representative Jimmy Panetta proudly serves California's 19th Congressional District in the U.S. House of Representatives. His diverse and beautiful district stretches from south San Jose in Santa Clara County, over the hills into Santa Cruz County, down the coastline of Monterey County, and into northern San Luis Obispo County. First elected in 2016, he is serving his fourth term in Congress. He currently serves on the House Committee on Ways and Means, the House Committee on Armed Services, and House Committee on the Budget. He also serves as a Chief Deputy Whip in the 118th Congress. Having grown up on the central coast of California, Representative Panetta understands the importance of giving back to the community and country that gave his Italian immigrant grandparents, his family, and him so much opportunity. He was instilled with a sense of public service and its importance to our communities and democracy, and his work is reflective of the values of the people who entrusted him to be their voice in our nation's capital. During his time in Congress, Representative Panetta has fought for affordable housing,

immigration reform, the continued protection of our pristine coastline and environment, accessible health care, our agriculture industry and its farmers and farmworkers, the reduction of gun violence, a fairer tax code, major infrastructure investment, sustainable conservation practices, our military installations that are an integral part of our community and our country's security, and the deserved and promised benefits to our veterans. Through policy implementation in Congress and service to constituents, Representative Panetta remains committed to being that bridge for the people of California's 19th Congressional District to the federal government and its resources. During the COVID-19 pandemic, he secured \$1.4 billion in relief for communities and families in California's 19th Congressional District and ensured relief was available for schools, local small businesses, as well as farmers and farm workers. He has passed into law legislation to promote clean energy, protect California's forests and pollinators, support frontline health care workers, tackle hunger among military families, and provide legal services to homeless veterans and veterans at risk for homelessness. Prior to Congress, Representative Panetta served his community as a prosecutor in Monterey and Alameda Counties and served our country as an Intelligence Officer in the U.S. Navy Reserve. In 2007, Congressman Panetta volunteered for active duty and was deployed to Afghanistan in support of Operation Enduring Freedom and was awarded the Bronze Star for meritorious service. Upon returning home, he served as a board member of the Veterans Transition Center, helped open Monterey County's first Veterans Treatment Court, and worked to establish the Central Coast Veterans Cemetery on the former Fort Ord. Representative Panetta attended local public schools and Monterey Peninsula Community College. He graduated from the University of California, Davis with an undergraduate degree in International Relations and earned his law degree from Santa Clara University. His wife, Carrie Panetta, is a Superior Court judge in Monterey County, and they have two daughters who are being educated at the same local public schools attended by Representative Panetta.

Scott Riplinger

Scott Riplinger has 20 years of private sector and government experience in Washington, DC, and is dedicated to helping clients develop and execute the strategies needed to succeed. A Partner at the CGCN Group since 2020, Riplinger's portfolio focuses on financial services, tax, artificial intelligence, technology, judiciary, appropriations, commerce, trade, and transportation issues.

Recognized as a top lobbyist by *The Hill*, Riplinger excels in his work with leadership teams and coalitions to develop custom messaging and successful advocacy strategies. From Fortune 50 companies, and small businesses, to not-for-profits, he successfully advances client interests on headline-grabbing issues to behind-the-scenes policies.

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Having served on Capitol Hill for 15 years in leadership roles for members of the Senate Finance Committee and Senate Banking, Housing and Urban Affairs Committee, he has crafted and advanced policy priorities from conception into law while cultivating extensive, expertise and connections in the US Senate.

During his tenure in the US Senate, Riplinger served as Legislative Director for Chairman Mike Crapo (R-ID) and Senator Dean Heller (R-NV) including serving as a liaison for the Senate Chief Deputy Whip where he worked hand-in-hand with Senate leadership. Scott also served as Majority Staff Director for the Securities, Insurance, and Investment Subcommittee where he worked on policy related to the US Treasury Department and the US Securities and Exchange Commission. He began his career with House Small Business Committee Chairman, Don Manzullo (R-IL). Riplinger is a proud graduate of Rock Valley Community College and Northern Illinois University. He lives in Arlington, Virginia with his wife, Lauren Riplinger.

Tim Rouse

Tim Rouse has over thirty years of experience in the financial services industry mainly within retirement services of large mutual fund companies. For the past twenty-five years Rouse has worked with major plan sponsors in state and local governments, corporations, Taft-Hartley plans, nonprofit hospitals, colleges and universities. Over his career, Rouse has worked with Voya Financial, Fidelity Investments, ICMA Retirement Corporation and The Vanguard Group.

Rouse is a former President of the National Association of Government Defined Contribution Administrators' Industry Board and a graduate of Villanova University.

The Hon. Preston Rutledge

Preston Rutledge was the Assistant Secretary of Labor for the Employee Benefits Security Administration (EBSA) during the Trump Administration, where he led an agency of over 800 employee benefits professionals in Washington, D.C. and thirteen regional offices. Following his government career, he founded Rutledge Policy Group LLC, a government affairs consultancy focused on tax, retirement savings and employee benefits policy. He also is a Strategic Consulting Advisor to Brownstein Hyatt Farber Schreck LLP, in Washington, D.C. At EBSA, Mr. Rutledge led the drafting and publication of guidance to implement retirement, health and workplace benefits policies, including rules governing ESG, proxy voting, private equity investment, the fiduciary advice rule, Association Retirement Plans, auto-portability and electronic disclosure. He also led oversight of the Federal Thrift Savings Plan, and represented the Secretary of Labor on the Boards of the Pension Benefit Guaranty Corporation and the Social Security and Medicare Trust Funds. Mr. Rutledge was a member of the Insurance and Private Pensions Committee at the Organization for Economic Co-operation and Development (OECD), and was Chair of the OECD Working Party on Private Pensions. Before joining the Department of Labor, Mr. Rutledge served as Senior Tax and Benefits counsel for the U.S. Senate Finance Committee under Chairman Orrin G. Hatch (R-UT).

Earlier in his career, Mr. Rutledge served on the Headquarters Staff of the Tax Exempt and Government Entities Division of the Internal Revenue Service (IRS), and in the Qualified Pension Plans Branch of the IRS Office of Chief Counsel. Mr. Rutledge also served as a law clerk on the United States Court of Appeals for the Fifth Circuit and worked in private law practice as an employee benefits counselor and ERISA litigator. Mr. Rutledge earned a B.S. in business, cum laude, from the University of Idaho; a J.D., with high honors, from the George Washington University School of Law, where he was a member of the Law Review and the Order of the Coif, and an L.L.M. – Taxation, with distinction, from the Georgetown University Law Center. Prior to law school, Mr. Rutledge was a Naval Officer, serving in the Supply Corps on the Destroyer Escort U.S.S. Bagley, and at the Pacific Fleet Accounting and Disbursing Center in San Diego, CA, where his duties included supply, logistics, contracting, and fiscal matters.

Anna Sandor

Anna is a Senior Counsel in the Chief Counsel's Office of the SEC's Division of Investment Management. Anna focuses on policy and regulatory issues related to investment advisers and investment companies, including issues involving multinational asset management firms. In 2023, she was awarded the IM Division Director's Award for the Chief Counsel's Office, and in 2024 Anna received the SEC International Honorary Award as member of the open-ended fund liquidity project team.

Prior to joining the SEC, Anna served as Securities Counsel for Mission-Square Retirement, a retirement plan administrator with its own investment offerings. Before that, Anna was an associate in the investment management practice group at Morgan, Lewis & Bockius LLP. Anna received her J.D. from the Georgetown University Law Center and her B.A. from the University of Wisconsin–Madison.

John Scott

John Scott directs Pew's retirement savings project, which conducts original research and works with experts and policymakers to understand the barriers to retirement savings in the United States; policy initiatives that might increase retirement savings; and whether strengthening the disclosure of fees can help employers and employees make better decisions about retirement plans.

Before joining Pew, Scott taught and conducted research on public policy at the University of North Carolina at Chapel Hill with a focus on issues related to aging, tax policy, and the policymaking process. Scott also worked in advocacy on retirement and compensation issues in Washington. He began his career as a tax attorney and consultant in the financial services industry with a focus on pension plan design and legal compliance.

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Scott holds a bachelor's degree in economics from Swarthmore College, a master's in sociology from the University of Maryland, a law degree from Pennsylvania State University, and a doctorate in sociology from Cornell University.

Michael Sinacore

Michael Sinacore is a policy professional with experience in economic and pension-related matters in the U.S. Senate. He currently serves as the Pensions Policy Director for U.S. Senate Committee on Health, Education, Labor, & Pensions (HELP) Chair Dr. Bill Cassidy (R-LA). Prior to this role, Sinacore worked as an Economic Policy Advisor in the Office of U.S. Senator Rob Portman (R-OH).

Sinacore's expertise in economic policy has been recognized in various contexts. In November 2020, he participated in a discussion about retirement policy at an event organized by the American Academy of Actuaries, where he was identified as an economic policy advisor for Senator Rob Portman.

His professional background demonstrates a focus on economic and pension-related issues within the legislative branch of the U.S. government, particularly in advisory and leadership roles related to Senate committees and subcommittees.

Rep. Tim Walberg

U.S. Representative Tim Walberg is currently serving his ninth term in Congress as the representative of southern Michigan, making him Dean of the Michigan congressional delegation. The diverse constituency of Michigan's 5th District encompasses Branch, Cass, Hillsdale, Jackson, Lenawee, Monroe, and St. Joseph Counties, along with portions of Berrien, Calhoun, and Kalamazoo Counties. Since first taking office, Representative Walberg has hosted hundreds of coffee and town hall meetings to better understand the thoughts and concerns of the district.

Prior to his time in public office, Representative Walberg served as a pastor in Michigan and Indiana, as president of the Warren Reuther Center for Education and Community Impact, and as a division manager for Moody Bible Institute. He also served in the Michigan House of Representatives from 1983 to 1999, and is proud to bring his reputation as a principled legislator, fiscal reformer, and defender of traditional values to Washington.

Based on his record of legislative accomplishment, Congressman Walberg holds the designation as Michigan's most conservative Member of Congress, based on the American Conservative Union's lifetime score. He was also ranked by the Center for Effective Lawmaking, a non-partisan collaboration between Vanderbilt University and University of Virginia, as the most effective member of Michigan's congressional delegation in the 115th Congress. In the following session of Congress, the Center for Effective Lawmaking once again recognized Representative Walberg for his policy-making success, naming him the top Republican legislator on technology issues.

In the 119th Congress, Congressman Walberg serves as Chair of the House Education and Workforce Committee. He also serves on the House Natural

Resources Committee.

He and his wife, Sue, have been married for over 50 years, love being grandparents, and enjoy spending time outdoors and riding on their Harley. They live in Tipton, Michigan, where they raised their three children: Matthew, Heidi and Caleb. He is a proud grandfather of seven.

Nathan Glassey

Nathan Glassey is the Director of Federal & State Legislative Affairs for the American Retirement Association (ARA), an organization of more than 30,000 members nationwide who provide consulting and administrative services to millions of American workers, savers, and the sponsors of retirement plans. The ARA has two key missions: to educate and inform retirement benefits professionals and to advocate for policies that give every working American the ability to have a comfortable retirement.

Additionally, Nathan is the Executive Director of the National Tax-Deferred Savings Association (NTSA), as of March 2022. The NTSA was formed in 1989 and is nationally recognized for its thought leadership and policy expertise regarding public-sector retirement plans. NTSA represents its membership in Washington, D.C., and state capitals across the country to address issues and design retirement plans that improve employee outcomes.

Glassey graduated from the University of Utah with a degree in accounting. While attending the university, he began working in the retirement industry and remained with National Benefit Services (NBS) for 19 years. During his time at NBS, he focused on non-ERISA plans with a heavy emphasis on the K-14 market. Nathan finished his years at NBS as the Vice President of Retirement Services, overseeing all non-ERISA plans as well as ERISA plans.

Erika Goodwin

Erika Goodwin is the Director of Advocacy Engagement for the American Retirement Association (ARA). In her role, Erika is responsible for developing and executing strategies aimed at enhancing member engagement in ARA's government affairs advocacy initiatives, including managing programs aimed at addressing social and economic issues affecting retirement policy and developing and sustains relationships with members to encourage and facilitate member involvement with federal and state representatives. In addition, she communicates key developments to ARA members, leads grass tops engagement strategy, and manages ARA's Political Action Committee

Prior to joining the ARA Government Affairs team, Erika spent 6 years with the ARA in the role of NAPA Conference Manager and NTSA Membership Manager. She is a graduate of the first Historically Black College to confer degrees, Lincoln University, PA and holds Project Management Professional and Certified Meetings Professional designations.

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Brian H. Graff

Brian H. Graff, Esq., is the Chief Executive Officer of the American Retirement Association, the umbrella organization for the American Society of Pension Professionals and Actuaries (ASPPA), the American Society of Enrolled Actuaries (ASEA), the National Association of Plan Advisors (NAPA), the National Tax-deferred Savings Association (NTSA), and the Plan Sponsor Council of America (PSCA). Graff oversees the American Retirement Association's operations, and working with the Board of Directors, charts the strategic direction for the organization. Graff also serves as the Executive Director of ASPPA and NAPA. The American Retirement Association is a national organization of more than 34,000 retirement plan professionals who provide advisory and administrative services for qualified retirement plans covering tens of millions of American workers. In addition to representing the interests of its members before Congress and federal regulatory agencies on a combined basis, the American Retirement Association annually conducts more than a dozen industry conferences and annually administers more than 7,000 examinations leading to various industry-related professional credentials.

Graff actively speaks on behalf of the retirement plan system and has been quoted in *The Washington Post*, *The Wall Street Journal*, and interviewed by various television outlets. He has testified on retirement policy issues before Congress and various federal regulators on numerous occasions.

An attorney (District of Columbia) and certified public accountant (New York-inactive), Graff was formerly Legislation Counsel to the U.S. Congress Joint Committee on Taxation where he provided policy and technical analysis relating to employee benefits, health care and Social Security to members of Congress. While working for Congress, Graff participated in the development of legislation, including the Small Business Job Protection Act of 1996 and the Health Insurance Portability and Accountability Act of 1996. Prior to working on Capitol Hill, Graff was associated with the Washington, DC, law firm, The Groom Law Group, which specializes in employee benefits. Graff has also served in a leadership volunteer capacity for various organizations. He currently serves on the Board and as Treasurer of the Congressional Coalition on Adoption Institute and previously was Chair of the Board of the Jane Goodall Institute. Graff received his doctoral degree in law, cum laude, from the University of Pennsylvania Law School in Philadelphia. He holds a Bachelor of Science in Economics with distinction from Cornell University in Ithaca, NY.

Will Hansen

Will Hansen joined the American Retirement Association (ARA) in January 2019 in the new role of Chief Government Affairs Officer. In this position, Will oversees all advocacy activities at the federal, state, and local levels on behalf of the five trade organizations within ARA. In addition, Will is the Executive Director of Plan Sponsor Council of America (PSCA) as of January 2020. Founded in 1947, PSCA has been at the forefront of protecting the American retirement system and is committed to improving workers' retirement security by providing advocacy, insights, and education to plan sponsors.

Hansen, an attorney with an LLM in Employee Benefits from The John Marshall Law School, joined ARA from The ERISA Industry Committee (ERIC), where he was the Senior Vice President of Retirement and Compensation Policy. He joined ERIC from the Holland America Group where he served as Senior Manager of Global Employee Benefits overseeing employee benefit programs for five cruise brands under the Carnival Corporate umbrella. Hansen previously served as the Executive Director of the United States Congress Joint Economic Committee, as well as Legislative Counsel for Senator Robert Casey, Jr. (D-PA), advising the Senator on tax, pension, budget, and social security issues, and as Legislative Director for Senator Tammy Baldwin (D-WI). He also has experience as an employee benefits attorney with McDermott Will & Emery LLP, where he focused on qualified and non-qualified retirement plans.

Charlie Jaramillo

Charlie Jaramillo is currently serving as a Government Affairs Summer Intern at the American Retirement Association, where he supports key functions related to data entry and policy research. In this role, he contributes to the organization's advocacy efforts by organizing and maintaining accurate legislative data, and assisting with analytical tasks that support informed decision-making processes on retirement policy issues.

Charlie is pursuing a bachelor's degree in finance and accounting at West Virginia University, where he has developed a solid foundation in financial analysis, corporate finance, and regulatory frameworks. His academic work is complemented by his internship experience, which has provided valuable exposure to the intersection of finance and public policy.

With a strong interest in financial services and capital markets, Charlie is actively working toward a long-term career in the finance industry. He is committed to building the skills and professional experience necessary to succeed in a dynamic, fast-paced environment. By leveraging opportunities such as internships and campus involvement, he aims to expand his practical knowledge and position himself competitively for future full-time roles in finance.

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Kelsey Mayo

Kelsey Mayo is the Regulatory Affairs Chief for the American Retirement Association. In this role she works with the government agencies that impact ARA members, with a particular focus on the IRS and PBGC. Kelsey also is the Lead Employee Benefits Partner at Poyner Spruill, LLP, a law firm based in North Carolina. Kelsey has extensive experience in virtually all aspects of employee benefit plans and executive compensation arrangements. Prior to taking on the role of Director of Regulatory Affairs, Kelsey was a long-time volunteer on both the ASPPA and ASEA (formerly ACOPA) Government Affairs Committee. Along with her passion for the industry, Kelsey brings her background in accounting and study for the actuarial exams to bear for the benefit of ARA and its members.

Madison Oakley

Madison Oakley is the Advocacy Engagement Manager for the American Retirement Association (ARA). In this role, she executes strategies aimed at enhancing member engagement in advocacy initiatives, including D.C. Fly-in meetings for constituents, grassroots advocacy campaigns, and the Political Action Committee. She also facilitates volunteer committee activities for the ARA and its member organizations, which include the American Society of Pension Professionals and Actuaries (ASPPA), the American Society of Enrolled Actuaries (ASEA), the National Association of Plan Advisors (NAPA), the National Tax-deferred Savings Association (NTSA), and the Plan Sponsor Council of America (PSCA).

Madison has a background in political fundraising. Prior to joining ARA, she spent four years at Molly Allen Associates LLC where she was responsible for PAC fundraising strategies for several Members of Congress and candidates. Previously, she was Deputy Finance Director for a congressional campaign in Nevada and interned for a Senate campaign in Wisconsin. Madison has a Bachelor of Arts in Political Science and Critical Identity Studies from Beloit College.

Josh Oppenheimer

Josh Oppenheimer joined the American Retirement Association (ARA) in January 2025 as Senior Director of Federal Legislative Affairs. In this role, he leads key initiatives in ARA's federal legislative strategy, engaging with Congressional offices and regulatory agencies to advance policies that enhance retirement security and protect the interests of plan sponsors, participants, and service providers.

Josh brings extensive experience from the executive and legislative branches of the federal government. Most recently, he served as a Biden-Harris Administration political appointee at the U.S. Department of Labor. He held key roles, including Senior Policy Advisor in the Employee Benefits Security Administration and Deputy Oversight Counsel & Senior Legislative Officer in the Office of Congressional and Intergovernmental Affairs. In these capacities, he led a nationwide education and outreach initiative

to expand retirement plan adoption among small businesses in underserved communities. He represented the Department before Congress on retirement-related rulemaking and managed oversight inquiries, including responses to subpoenas for privileged information.

Before his executive branch service, Josh was Senior Pensions Counsel for the U.S. Senate Committee on Health, Education, Labor & Pensions (HELP) under Chairs Bernie Sanders (I-VT) and Patty Murray (D-WA). He oversaw the Committee's pensions and retirement portfolio, providing expert analysis on the Employee Retirement Income Security Act (ERISA) and other key legislative issues, including the SECURE Act, the Butch Lewis Emergency Pension Plan Relief Act, cryptocurrency in retirement plans, and ESG & fiduciary regulations. He was pivotal in drafting and negotiating the SECURE 2.0 Act of 2022, including the HELP Committee's RISE & SHINE Act.

Before entering government, Josh was an associate at Steptoe LLP, advising clients on complex ERISA and financial regulatory, legislative, and political matters.

Josh holds a Juris Doctorate, Master of Public Administration, and a bachelor's degree from the University of Pennsylvania.

Allison Wielobob

Allison Wielobob is the General Counsel of the American Retirement Association. In this role, she directs the legal activities of ARA, ensuring compliance with federal, state, and local requirements and advises senior management on strategies and their implementation. Allison also participates in ARA's advocacy efforts, representing the member associations of the ARA in communications with Congress and government agencies. Allison Wielobob brings more than 20 years of employee benefits law experience—both in government service and private practice—advising on a range of legal matters under the Employee Retirement Income Security Act. Prior to joining ARA, Allison practiced at a large international law firm and served as a legislation counsel for the Joint Committee on Taxation of the U.S. Congress working on employee benefits legislative matters. Allison also worked at the U.S. Department of Labor, on the staff of the Office of Regulations and Interpretations of the Employee Benefits Security Administration and as an attorney-adviser in the Office of Chief Counsel of the Internal Revenue Service. She is a Fellow of the American College of Employee Benefits Counsel.

Allison got her undergraduate degree at Trinity College (Connecticut) and her legal education at Temple University (J.D.) and Georgetown University Law Center (LL.M.).