

AGENDA

As of July 21, 2025

Tuesday, July 22

8:00 – 9:00 a.m. PAC Member Breakfast

*The Honorable Blake Moore (R-UT),
U.S. House of Representatives*

*The Honorable Jimmy Panetta (D-CA),
U.S. House of Representatives*

*Will Hansen, Chief Government Affairs
Officer, American Retirement Association
(ARA)*

10:00 a.m. OPENING REMARKS

*Brian Graff, Chief Executive Officer
American Retirement Association (ARA)*

10:05 – 10:30 a.m. Rebalancing the Portfolio: The SEC's Perspective on Private Market Integration

*Anna Sandor, Senior Counsel, U.S.
Securities and Exchange Commission*

*Kelsey Mayo, Chief of Retirement
Policy & Regulatory Affairs, American
Retirement Association (ARA)*

10:30 – 10:55 a.m. Inside the DOL: A Former Regulator's Take on Private Markets and What Comes Next

*The Honorable Preston Rutledge, Former
Assistant Secretary, Employee Benefits
Security Administration*

*Kelsey Mayo, Chief of Retirement
Policy & Regulatory Affairs, American
Retirement Association (ARA)*

11:00 – 11:45 a.m. Two Pillars, One Purpose: How Social Security and Private Plans Work Together

*Craig Copeland, Ph.D., Director, Wealth
Benefits Research, Employee Benefit
Research Institute (EBRI)*

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

*Brian Graff, CEO, American Retirement
Association (ARA)*

11:50 a.m. – 12:10 p.m. What's Next: Policy Forecast from Both Sides of the Aisle

Shannon Finley, Partner, Capitol Counsel

Scott Riplinger, Partner, CGCN Group

*Moderator: Will Hansen, Chief
Government Affairs Officer, American
Retirement Association (ARA)*

12:10 – 12:30 p.m. Lunch Service

12:30 - 12:40 p.m. Insiders Update - The ARA PAC

*Alicia Malcolm, UBS Financial Services,
2025 NAPA President-Elect*

12:40 – 1:30 p.m. Lunch & Legislation: Turning Ideas into Advocacy

*Kelsey Mayo, Chief of Retirement
Policy & Regulatory Affairs, American
Retirement Association (ARA)*

1:30 – 2:00 p.m. Networking Coffee Break

2:00 – 2:30 p.m. Laying the Groundwork: The Policy and Politics Behind SECURE 3.0

*Kara Getz, Chief Counsel, U.S. House
Committee on Ways & Means
(Minority Staff)*

*Michael Sinacore, Pensions Policy
Director, U.S. Senate Committee on
Health, Education, Labor & Pensions
(Majority Staff)*

*Moderator: Josh Oppenheimer, Senior
Director of Federal Legislative Affairs,
American Retirement Association (ARA)*

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2:35 – 3:00 p.m.

Leadership in Action: Chairman Walberg's Outlook on Retirement Policy

*The Honorable Tim Walberg (R-MI),
U.S. House of Representatives*

Brian Graff, CEO, American Retirement Association (ARA)

3:15 – 3:45 p.m.

The Litigation Lens: Policy, Process, and Prevention

Thomas Clark, Partner and Chief Operating Officer, Wagner Law Group

Tess Gee, Legal Director, Pension Rights Center

Allison Wielobob, General Counsel, American Retirement Association (ARA)

3:50 – 4:15 p.m.

The Saver's Match in Motion: Turning Policy into Participation

Tim Rouse, Executive Director, The SPARK Institute, Inc.

John Scott, Director for Retirement Savings Project, The Pew Charitable Trusts

Helen Morrison, Benefits Tax Counsel, U.S. Department of the Treasury

Nate Glassey, Director of Federal & State Legislative Affairs, American Retirement Association (ARA)

4:20 – 4:50 p.m.

Health and Wealth: What Advisors Need to Know About the New HSA Landscape

Michelle Reinke Neblett, Government Operations, The Boeing Company

Will Hansen, Chief Government Affairs Officer, American Retirement Association (ARA)

4:55 – 5:30 p.m.

Closing Remarks: From Insight to Action

The Honorable Vern Buchanan (R-FL), U.S. House of Representatives

Brian Graff, CEO, American Retirement Association (ARA)

Lisa Drake, SageView Advisory Group, 2025 NAPA President

5:30 – 6:30 p.m.

Evening Reception

6:45 – 8:30 p.m.

Delegate Dinner on Your Own

Wednesday, July 23

7:15 – 8:30 a.m.

State Delegation Breakfast & Briefing

7:45 - 7:55 am

Pre-Hill Meeting Speaker

The Honorable Maggie Hassan (D-NH), U.S. Senate

8:00 am

Bus Departures Begin

8:00 – 9:00 a.m.

Pre-Hill Meeting Speaker & Bus Departures

9:00 a.m. – 1:00 p.m.

Delegate Meetings on Capitol Hill

12:30 – 1:30 p.m.

Closing Lunch & Interactive Download of Hill Meetings