
**Strategic Convening on
Women and Retirement at Divorce**

October 29, 2019

Agenda

8:30 – 9:00 **Registration and Breakfast**

9:00 – 9:30 **Introductory Comments**

Karen Friedman, Executive Vice President and Policy Director, Pension Rights Center

Emily Spreiser, Legal Program Director, Pension Rights Center

Hilary Dalin, Director, Office of Elder Justice and Adult Protective Services, Administration for Community Living

9:30 – 10:45 **Panel One: Outreach and Education**

Moderator: **Catherine Harvey**, *Senior Policy Research Analyst, AARP*

Panelists: **Amy Matsui**, *Senior Counsel and Director of Income Security, National Women’s Law Center*

Allison Wielobob, *General Counsel, American Retirement Association*

Bibi Berry, *Family Magistrate, Circuit Court for Montgomery County, Maryland*

Jennifer Anders-Gable, *Managing Attorney, Western States Pension Assistance Project*

10:45 – 11:00 **Break**

11:00 – 12:15 **Panel Two: Increasing Access to QDROs through Model QDROs and Other Solutions**

Moderator: **Regina Jefferson**, *Professor of Law, Columbus School of Law, Catholic University*

Panelists: **Betty Nordwind**, *Executive Director, Harriett Buhai Center for Family Law*

Laura Grogan-O’Mara, *Director, Retirement Public Policy, Retirement & Personal Wealth Solutions, Bank of America*

Anne Moss, *QDRO Attorney*

Louise Nixon, *Founder/CEO, QDROcounsel*

12:15 – 1:15 Lunch

1:15 – 2:30 Panel Three: Improving the QDRO Submission Process

Moderator: **Charles Storke**, *Of Counsel, Trucker Huss*

Panelists: **Martin Bolt**, *Staff Attorney, South Central Pension Rights Project*
Joyce Mader, *Partner, O’Donoghue & O’Donoghue, LLP*
Thomas Alvarado, *Managing Director, Money Movement Services and Life Event Services, TIAA*
Susan Rees, *Of Counsel, The Wagner Law Group*

2:30 – 2:45 Break

2:45 – 4:00 Panel Four: Additional Complicating Factors

Moderator: **Aliya Robinson**, *Senior Vice President, Retirement & Compensation Policy, ERISA Industry Committee*

Panelists: **The Honorable Holly J. Ford**, *Judge, Philadelphia County Court of Common Pleas*
Anna Bosmans, *Pension Fund Manager, National Automatic Sprinkler Industry Pension Fund*
Emilee Hoover, *QDRO Analyst, Fidelity Investments*
Rebecca Henry, *Deputy Chief Counsel, American Bar Association Commission on Domestic and Sexual Violence*

4:00 – 4:10 Summary Remarks

4:10 – 4:50 Strategy Sessions

Facilitators: **The Honorable Phyllis C. Borzi**, *Former Assistant Secretary of Labor, Employee Benefits Security Administration*
Judy Mazo, *Former Senior Vice President and Director of Research, The Segal Company*
Sharon Goodman, *Principal, Slevin & Hart, P.C.*
Norman Stein, *Senior Policy Advisor, Pension Rights Center / Professor of Law, Thomas R. Kline School of Law, Drexel University*

4:50 – 5:15 Strategy Session Reports and Closing Remarks

5:30 – 8:00 Reception