



**Saving for Your Golden Years:
Trends, Challenges and Opportunities**

AGENDA

**The Willard Intercontinental, Washington, D.C.
March 1-2, 2006**

Tuesday, February 28, 2006

4:00 p.m. – 6:00 p.m.	Summit Registration	2nd Floor Alcove
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Wednesday, March 1, 2006

8:30 a.m. – 9:30 a.m.	Summit Registration	Ballroom Lobby
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8:30 a.m. – 9:30 a.m.	Continental Breakfast	Buchanan & Pierce Rooms
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9:30 a.m. – 9:40 a.m.	Presentation of Color Guard and National Anthem	Ballroom
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9:40 a.m. – 9:45 a.m.	Introduction of Secretary Elaine L. Chao <i>Ann L. Combs, Assistant Secretary, Employee Benefits Security Administration, U.S. Department of Labor</i>	Ballroom
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9:45 a.m. – 10:00 a.m.	Welcome and Opening Remarks <i>The Honorable Elaine L. Chao, U.S. Secretary of Labor</i>	Ballroom
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10:00 a.m. – 10:05 a.m.	Overview and Introduction <i>Ann L. Combs, Assistant Secretary, Employee Benefits Security Administration, U.S. Department of Labor</i>	Ballroom
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10:05 a.m. – 10:35 a.m.	Review of Previous Summits and Current Status of Retirement Savings <i>Sylvester J. Schieber, Ph.D., Vice President and U.S. Director of Benefits Consulting, Watson Wyatt Worldwide</i>	Ballroom
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10:35 a.m. – 10:45 a.m.	Video Introduction of Breakout Groups	Ballroom
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10:45 a.m. – 11:00 a.m.	Break	
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11:00 a.m. – Noon **Four Concurrent Breakout Sessions**

Delegates will work in one of four teams to examine the challenges facing four distinct groups by discussing ways to reach out with retirement savings messages and help overcome savings obstacles. The Summit will address the central issues facing workers and families. The groups to be examined are:

Group A: Low-Income Workers Buchanan Room

Speaker: **Kirk Johnson, Ph.D.**, *Senior Policy Analyst, Center for Data Analysis, The Heritage Foundation*

Group B: Small Business Employees Nest Room

Speaker: **Renee V. Schaaf**, *Vice President of Retirement and Investor Services, Principal Financial Group*

Group C: New Entrants to the Workforce Pierce Room

Speaker: **Lori Lucas, CFA**, *Director of Retirement Research, Hewitt Financial Services, Hewitt Associates, LLC*

Group D: Workers Nearing Retirement Crystal Room

Speaker: **Sylvester J. Schieber, Ph.D.**, *Vice President and U.S. Director of Benefits Consulting, Watson Wyatt Worldwide*

Noon – 1:15 p.m. **Luncheon Program** Ballroom

Mr. Ben Stein, *Actor, Author, Economist, Lawyer, Teacher, Expert on Finance*

1:15 p.m. – 1:30 p.m. **Break**

1:30 p.m. – 4:30 p.m. **Four Concurrent Breakout Sessions**

Delegates will review model savings programs and develop action plans targeting four distinct groups.

Group A: Low-Income Workers Buchanan Room

Facilitator: **Scott Smith**, *Futurist and Director of Research Applications, Social Technologies, LLC*

Expert: **Kirk Johnson, Ph.D.**, *Senior Policy Analyst, Center for Data Analysis, The Heritage Foundation*

Presenter: **Steven Dow**, *Executive Director, Community Action Project of Tulsa County*

Group B: Small Business Employees Nest Room

Facilitator: **Don Abraham**, *Futurist and Director of Development, Social Technologies, LLC*

Expert: **Renee V. Schaaf**, *Vice President of Retirement and Investor Services, Principal Financial Group*

Presenter: **Rob Zeldenrust**, *General Manager, Fremont Co-operative Produce Company*

Four Concurrent Breakout Sessions (Continued)

Group C: New Entrants to the Workforce Pierce Room

- Facilitator: **Atul Dighe**, *Futurist, 5 Big Questions About the Future*
- Expert: **Lori Lucas, CFA**, *Director of Retirement Research, Hewitt Financial Services, Hewitt Associates, LLC*
- Presenter: **Jeffrey D. Wiker**, *Vice President of Administration, Fleet Manager, H.L. Wiker, Inc.*
- Presenter: **Danielle R. Shanes**, *Manager of Work Environment, The McGraw-Hill Companies*
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Group D: Workers Nearing Retirement Crystal Room

- Facilitator: **Tom Conger**, *Futurist and Founder, Social Technologies, LLC*
- Expert: **Sylvester J. Schieber, Ph.D.**, *Vice President and U.S. Director of Benefits Consulting, Watson Wyatt Worldwide*
- Presenter: **Deborah K. Lebryk**, *Director of External Relations, Monsanto Company*
- Presenter: **Charlotte Lazar-Morrison, CEBS**, *Principal Director of Human Resources, The Aerospace Corporation*

- 5:30 p.m. – 6:30 p.m. **Reception at Willard Intercontinental Hotel** Crystal Room
- 6:20 p.m. – 7:10 p.m. **Shuttle to the Russell Senate Office Building** Hotel F Street Entrance
- 7:10 p.m. – 9:00 p.m. **Dinner Program** Russell Senate Caucus Room

Invocation

Welcome and Opening Remarks

The Honorable Elaine L. Chao, *U.S. Secretary of Labor*

Keynote Speaker

The Honorable Gordon Smith, *Chairman, Senate Special Committee on Aging*

Closing Remarks

The Honorable Elaine L. Chao, *U.S. Secretary of Labor*

- 9:00 p.m. – 9:30 p.m. **Shuttle to The Willard Intercontinental Hotel**

Thursday, March 2, 2006

7:30 a.m. – 9:15 a.m.	Breakfast Program	Ballroom
	Remarks by Congressional Speakers	
	The Honorable Charles Grassley , <i>Chairman, Senate Finance Committee</i>	
	The Honorable Michael Oxley , <i>Chairman, House Financial Services Committee</i>	
9:15 a.m. – 10:00 a.m.	Introduction of Keynote Speakers	Ballroom
	The Honorable Elaine L. Chao , <i>U.S. Secretary of Labor</i>	
	Keynote Speakers	
	The Honorable Don Evans , <i>CEO, The Financial Services Forum</i>	
	The Honorable Richard B. Cheney , <i>Vice President of the United States of America</i>	
10:00 a.m. – 10:15 a.m.	Break	
10:15 a.m. – Noon	Four Concurrent Breakout Sessions	
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	Group A: Low-Income Workers	Buchanan Room
	Facilitator: Scott Smith , <i>Futurist and Director of Research Applications, Social Technologies, LLC</i>	
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	Group B: Small-Business Employees	Nest Room
	Facilitator: Don Abraham , <i>Futurist and Director of Development, Social Technologies, LLC</i>	
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	Group C: New Entrants to the Workforce	Pierce Room
	Facilitator: Atul Dighe , <i>Futurist, 5 Big Questions About the Future</i>	
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	Group D: Workers Nearing Retirement	Crystal Room
	Facilitator: Tom Conger , <i>Futurist and Founder, Social Technologies, LLC</i>	
Noon – 12:15 p.m.	Break	
12:15 p.m. – 2:00 p.m.	Luncheon Program	Ballroom
	Reports from the Breakout Groups	Ballroom
	Facilitator: Tom Conger , <i>Futurist and Founder, Social Technologies, LLC</i>	
2:00 p.m. – 2:15 p.m.	Closing Remarks	Ballroom
	The Honorable Elaine L. Chao , <i>U.S. Secretary of Labor</i>	



EXPERT SPEAKERS/FACILITATORS/MODEL PRESENTERS

Expert Speakers

Sylvester J. Schieber, Ph.D.

Vice President and U.S. Director of Benefits Consulting
Watson Wyatt Worldwide
Arlington, Virginia

Kirk Johnson, Ph.D.

Senior Policy Analyst, Center for Data Analysis
The Heritage Foundation
Washington, D.C.

Lori Lucas, CFA

Director of Retirement Research
Hewitt Financial Services
Hewitt Associates, LLC
Lincolnshire, Illinois

Renee V. Schaaf

Vice President of Retirement and Investor Services
Principal Financial Group
Des Moines, Iowa

Facilitators

Don Abraham

Futurist and Director of Development
Social Technologies, LLC
Washington, D.C.

Tom Conger

Futurist and Founder
Social Technologies, LLC
Washington, D.C.

Atul Dighe

Futurist
5 Big Questions About the Future
Bowie, Maryland

Scott Smith

Futurist and Director of Research Applications
Social Technologies, LLC
Washington, D.C.

Model Presenters

Steven Dow

Executive Director
Community Action Project of Tulsa County
Tulsa, Oklahoma

Charlotte Lazar-Morrison, CEBS

Principal Director of Human Resources
The Aerospace Corporation
El Segundo, California

Deborah K. Lebryk

Director of External Relations
Monsanto Company
St. Louis, Missouri

Danielle R. Shanes

Manager of Work Environment
The McGraw-Hill Companies
New York, New York

Jeffrey D. Wiker

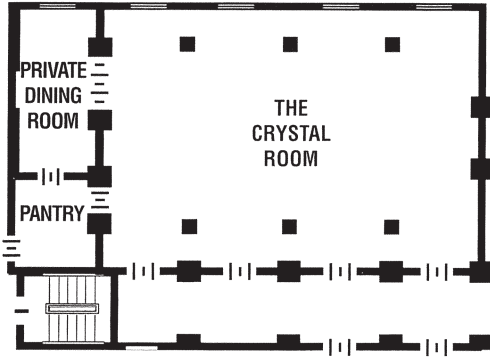
Vice President of Administration
Fleet Manager
H.L. Wiker, Inc.
Lancaster, Pennsylvania

Rob Zeldenrust

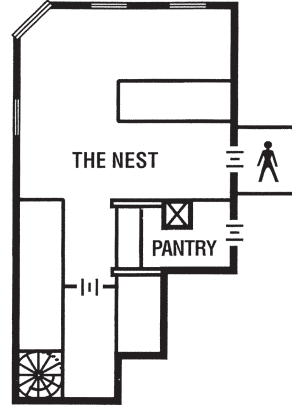
General Manager
Fremont Co-operative Produce Company
Fremont, Michigan

WILLARD
INTER-CONTINENTAL
WASHINGTON

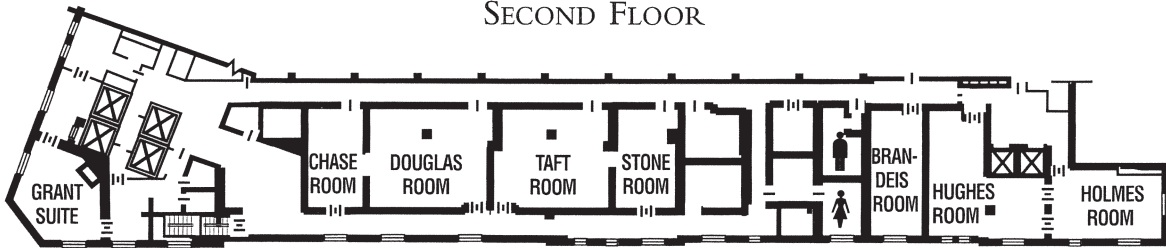
LOBBY LEVEL



MEZZANINE LEVEL



SECOND FLOOR



LOWER LEVEL

