

**U.S. DEPARTMENT OF LABOR  
ADVISORY COUNCIL ON EMPLOYEE WELFARE AND  
PENSION BENEFIT PLANS**

**Teleconference**

**Thursday, June 24, 2021**

9:00 a.m. to 5:30 p.m. Eastern Time

(the schedule below is approximate and subject to change)

- I. Welcome** Glenn Butash, Council Chair
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- II. Morning Witnesses - Understanding Brokerage Windows in Self-Directed Retirement Plans**
- 9:10 a.m. - 9:15 a.m. Introduction to Issue Topic – Bill Johnsen, Issue Chair
- 9:15 a.m. - 10:00 a.m. Kent A. Mason, Davis & Harman LLP
- 10:00 a.m. - 10:45 a.m. Alison Borland, Alight Solutions
- 11:00 a.m. - 11:45 a.m. Chantel Sheaks, U.S. Chamber of Commerce
- 11:45 a.m. - 12:25 p.m. W. Frank Porter, Empower Retirement
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- III. Afternoon Witnesses - Gaps in Retirement Savings Based on Race, Ethnicity and Gender**
- 1:25 p.m. - 1:30 p.m. Introduction to Issue Topic – John Harney, Issue Chair
- 1:30 p.m. - 2:15 p.m. Kris Nguyen, U.S. Government Accountability Office
- 2:15 p.m. - 2:45 p.m. John W. Rogers, Jr., Ariel Investments
- 3:00 p.m. - 3:45 p.m. Norman P. Stein, Thomas R. Kline School of Law, Drexel University
- 3:45 p.m. - 4:30 p.m. Nari Rhee, UC Berkeley Labor Center
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- IV. Opportunity for Public Comment**
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- V. Adjournment**

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**Teleconference**

**Friday, June 25, 2021**

9:00 a.m. to 5:30 p.m. Eastern Time

(the schedule below is approximate and subject to change)

- I. Welcome** Glenn Butash, Council Chair
- II. Morning Witnesses - Gaps in Retirement Savings Based on Race, Ethnicity and Gender**
- 9:05 a.m. - 9:10 a.m. Introduction to Issue Topic – John Harney, Issue Chair
- 9:10 a.m. - 9:55 a.m. Lori Lucas, EBRI
- 9:55 a.m. - 10:40 a.m. Monique Morrissey, Economic Policy Institute
- 10:55 a.m. - 11:40 a.m. Jan Jacobson, American Benefits Council
- 11:40 a.m. - 12:25 p.m. Jamal Rashad Watkins, NAACP
- III. Afternoon Witnesses - Understanding Brokerage Windows in Self-Directed Retirement Plans**
- 1:25 p.m. - 1:30 p.m. Introduction to Issue Topic – Bill Johnsen, Issue Chair
- 1:30 p.m. - 2:15 p.m. Aliya Robinson, ERIC
- 2:15 p.m. - 3:15 p.m. Kathleen A. Kelly, Compass Financial Partners  
Kevin Mahoney, FinDec Benefit Services
- IV. Council Discussion**
- V. EBSA Update** Ali Khawar, Acting Assistant Secretary, EBSA
- VI. Opportunity for Public Comment**
- VII. Adjournment**