

Financial Wellness for Longer Lives: New Approaches to Working and Saving

Thursday, January 18, 2018

Bank of America Conference Center

4 World Financial Center, 250 Vesey Street

| First Name | Last Name | Organization |
|------------|------------------|--|
| Carol | Allen | |
| Stephanie | Alleyne | |
| Walter | Allwine | Strategic Wellness & Insurance Management Service |
| Ramsey | Alwin | AARP |
| Josephine | Amendola | |
| James | Appleby | Gerontological Society of America |
| Ahsia | Badi | The New York Academy of Medicine |
| Frank | Bamberger | |
| Geri | Baumblatt | Articulations Consulting |
| Joan | Benjamin | AARP |
| Nan | Blackshear | Office of the Brooklyn Borough President |
| Don | Blandin | Investor Protection Trust |
| Nanette | Blandin | The Nexus Institute |
| Kimber | Bogard | The New York Academy of Medicine |
| Joseph | Borg | North American Securities Administrators Association |
| Robert | Brazier | BlackRock |
| Beth | Brockland | Center for Financial Services Innovation |
| Lalita | Brockington | Brockwill, LLC |
| Kasia | Buczowska | |
| Kelsey | Byrne | Enterprise Community Partners |
| Lisa | Cerbone-Montalto | Bank of America Merrill Lynch |
| Sandra | Chapman | Office of the Brooklyn Borough President |
| Leanne | Christensen | |
| Sebastian | Cimon Gagnon | John Hancock Insurance |
| Alison | Cooke Mintzer | PlanSponsor/PlanAdvisor |
| Donna | Corrado | New York City Department for the Aging |
| Kevin | Crain | Bank of America Merrill Lynch |
| Jeanne | de Cervens | Transamerica |
| Karen | DeMasters | Financial Advisor Magazine |
| Daniel | Dornbaum | Office of the New York City Comptroller |
| Julia | Ehrenfeld | Bank of America Merrill Lynch |
| Caitlin | Fahey | New York City Council |
| Veronica | Findlay | AARP |
| Beth | Finkel | AARP |
| Todd | Fliedner | |
| Robert | Freedman | Schiff Hardin |
| David | Fung | |

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|-----------|----------------|---|
| Tina | Gabriel | People's United Bank |
| Karen | Galbo | People's United Bank |
| Jean | Galiana | EasyCare Academy |
| Donald | Gallagher | Bank of America |
| Teresa | Ghilarducci | The New School for Social Research |
| Mark | Goldberger | SE |
| Lindsay | Goldman | The New York Academy of Medicine |
| Joanna | Gordon Martin | Theia Senior Solutions |
| Sheila | Gorman | Bank of America Merrill Lynch |
| Denise | Gosselin | The New York Academy of Medicine |
| Estelle | Green | |
| Charles | Gregoro | Gregoro LLC |
| Judith | Grimaldi | |
| Stacey | Hadash | Bank of America Merrill Lynch |
| Mark | Halloran | Transamerica |
| Mareidith | Hannon | Bank of America Merrill Lynch |
| Diane | Harris | PBS/Next Avenue |
| Michael | Hermann | UNFPA, United Nations Population Fund |
| Michael | Hernandez | AARP |
| Kathy-Ann | Hicks | PNC Bank |
| Michael | Hodin | Global Coalition on Aging |
| Drew | Holzapfel | ReACT (Respect a Caregiver's Time) |
| Cindy | Hounsell | Women's Institute for a Secure Retirement |
| Gregory | Iacurci | Investment News |
| Dorothy | Jie-de Miranda | |
| Caroline | Kahn | Morgan Stanley |
| Thomas | Kamber | OATS |
| Jason | Karlavish | University of Pennsylvania |
| Naomi | Karp | Consumer Financial Protection Bureau |
| Robert M. | Kaufman | Proskauer Rose LLP |
| John | Kennedy | JK Daily Money Management |
| Seung | Kim | LISC |
| Aliya | Latif | Office of the New York City Comptroller |
| Margaret | Laurens | AARP |
| Sharon | Lewis | UJA |
| David | Lieber | Sachs Insights |
| Angela | Link | Edward Jones |
| Zhe | Liu | |
| Liz | Loewy | EverSafe |
| Ron | Long | Wells Fargo |
| Philip C. | Marshall | BeyondBrooke.org |
| Will | McThaden | |
| Marilyn | McMichael | AARP |
| Melissa | Mitchell | Global Coalition on Aging |
| Gary | Mottola | FINRA |

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|------------|---------------------|---|
| Allison | Nickerson | LiveOnNY |
| Eliezer | Offenbacher | |
| Elizabeth | O'Brien | Money Magazine |
| Ana | Ortiz | |
| Karshme | Parameswar | |
| Dave | Paulsen | Transamerica |
| Joan | Perlman | AARP |
| Lauren | Perna | Mercer |
| Carol | Peters | Columbia University |
| Shari | Portnoy | Day Care Council of NY |
| David | Pusinsky | Bank of America |
| Stephanie | Raneri | Isaac H. Tuttle Fund |
| Carol | Raphael | Manatt Health Solutions |
| Gina | Ravosa | The New York Academy of Medicine |
| Caryn | Resnick | New York City Department for the Aging |
| Katy | Riddick | Global Coalition on Aging |
| Edward | Rogoff | LIU School of Business |
| Maria | Roman | State of New York |
| Emily | Rooney | NYC Council |
| Chris | Rosin | Bank of America |
| Brendan | Rueli | Bank of America Merrill Lynch |
| Tammy | Sachs | Sachs Insights |
| Judith A. | Salerno | The New York Academy of Medicine |
| Zachary | Schechter-Steinberg | Office of the New York City Comptroller |
| Jacqueline | Seltzer | |
| Janet | Smith | New York City Department for the Aging |
| Josephine | Sosa | |
| Carolyn | Stem | The New York Academy of Medicine |
| Mahlon | Stewart | Columbia University Medical Center |
| Scott | Stringer | Office of the New York City Comptroller |
| Barbara | Stubblebine | New York State Office for the Aging |
| May | Tai | |
| Michael | Taylor | |
| Caryn | Teitelbaum | The New York Academy of Medicine |
| Sandra | Timmermann | American College of Financial Services |
| Howard | Tischler | |
| Fabrizio | Tiso | Irene Home Equity Solutions, Inc |
| Roberto | Verthelyi | |
| Samuel | Wallace-Perdomo | Global Coalition on Aging |
| Robert | Wolf | The New York Academy of Medicine |
| Bruce | Wolfe | BlackRock Retirement Institute |
| Bei | Wu | NYU Aging Incubator |
| Julia | Wu | Sachs Insights |
| Joy | Yagman | |
| Gelilah | Yohannes | The New York Academy of Medicine |