



# New Mexico Retirement Savings Symposium

## A G E N D A

Tuesday, September 20, 2022  
**UNM Student Union Building Ballroom C**

Time	Topic	Presenter
9:30 – 9:40 am	Welcome and Opening Remarks	The Honorable Howie Morales, Lieutenant Governor of New Mexico
9:40 – 9:50 am	Introductions	<ul style="list-style-type: none"> <li>• Treasurer Tim Eichenberg</li> <li>• Gene Grant, Guest Moderator</li> </ul>
9:50-10:15 am	Retirement Savings Gap in New Mexico - Updated Research	• Dr. Michael O'Donnell, UNM Bureau of Business & Economic Research
10:15-10:30 am	NM Work and \$ave Solutions <ul style="list-style-type: none"> <li>• Retirement Plan Marketplace</li> <li>• IRA Program</li> </ul>	<ul style="list-style-type: none"> <li>• Lisa Massena, Massena Associates</li> <li>• Claudia Armijo, New Mexico Work and \$ave</li> </ul>
10:30-10:40 am	Break	
10:40-11:15 am	What <b>Will</b> Work and Why	<ul style="list-style-type: none"> <li>• Kim Olson, The Pew Charitable Trusts</li> <li>• Awesta Sarkash, Small Business Majority</li> <li>• Othiamba Umi, AARP New Mexico</li> </ul>
11:15-11:45 am	First-in-the-Nation Multi-State Partnership <ul style="list-style-type: none"> <li>• New Mexico/Colorado</li> <li>• Program Administration</li> </ul>	<ul style="list-style-type: none"> <li>• Treasurer Tim Eichenberg, New Mexico</li> <li>• Treasurer Dave Young, State of Colorado</li> <li>• Hunter Railey, Colorado Secure Savings</li> <li>• Courtney Eccles, Vestwell</li> <li>• Claudia Armijo, Work and \$ave</li> </ul>
11:45 am-1:00 pm	Lunch Courtesy of AARP New Mexico, Featuring Keynote Speaker	• Kathleen Kennedy Townsend, U.S. Department of Labor
1:00-2:00 pm	Business Panel <ul style="list-style-type: none"> <li>• Red Shovel Landscape</li> <li>• SeedCrest, Cannabis Workforce Solutions</li> <li>• Cannabis Chamber of Commerce</li> <li>• NM Black Caucus</li> </ul>	<ul style="list-style-type: none"> <li>• Kenny Grebe, Owner – Red Shovel</li> <li>• Larry Espinoza, Director of Operations – Red Shovel</li> <li>• Shannon Jaramillo – CEO/Founder, SeedCrest</li> <li>• Ben Lewinger – Executive Director, Cannabis Chamber of Commerce</li> <li>• The Honorable Pamela Herndon, President NM Black Caucus</li> </ul>
2:00-3:00 pm	Auto IRA Success Stories	<ul style="list-style-type: none"> <li>• Christine Cheng, Illinois Secure Choice</li> <li>• Courtney Eccles, Vestwell (formerly Illinois Secure Choice)</li> <li>• Michael Parker, Executive Director, OregonSaves</li> <li>• David Bell, Deputy Director, OregonSaves</li> <li>• Hunter Railey, Colorado Secure Savings</li> </ul>
3:00 pm	Thank You & Adjournment	• Gene Grant
3:00-4:00 pm	Roundtable Invitees (by Invitation) <ul style="list-style-type: none"> <li>• IPOC Members</li> <li>• NM Leadership &amp; Policymakers</li> </ul>	<ul style="list-style-type: none"> <li>• Kathleen Kennedy Townsend</li> <li>• Speakers &amp; Invited Guests</li> </ul>
Sandia Room		

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