

Speaker Biographies

Charlotte Ivancic

Policy Advisor

Office of Speaker John Boehner

Charlotte is currently serving as Speaker John Boehner's health care adviser. Previously, she spent 6 years working for the House Budget Committee where she developed Medicare reform proposals for Chairman Paul Ryan. Before working at the Budget Committee, Charlotte's Hill experience includes employment with Senator Majority Leader Bill Frist and Senator Jim DeMint. Prior to the Hill, Charlotte worked at Reed Smith LLP and Children's Hospital Boston/Harvard Medical School. She is a graduate of Wheaton College in Norton, MA and Boston University School of Law. She is a member of the DC Bar and the American Health Lawyers Association.

Aliya Wong

Executive Director, Retirement Policy

U.S. Chamber of Commerce

Aliya Wong is the Executive Director of Retirement Policy at the United States Chamber of Commerce. She is responsible for developing, promoting and publicizing the Chamber's policy on employer-provided retirement plans, nonqualified deferred compensation, and Social Security. Wong regularly meets with members of Congress, the administration, and regulatory agencies to promote the Chamber's retirement policy and represents the organization on the steering committee of several national coalitions. She led the Chamber's efforts on several pieces of retirement legislation, including the Pension Protection Act of 2006, the Workers, Retirees, and Employer Recovery Act of 2008, and the Preservation of Access to Care for Medicare Beneficiaries and Pension Relief Act of 2010.

Before joining the Chamber, Wong was a practicing attorney specializing in ERISA and tax qualification matters related to pension, health and welfare plans and executive compensation. She wrote an Internet article "Defined Benefit Plans in an Era of Phased Retirement." Wong co-authored an amicus curiae brief filed with the United States Supreme Court in the matter of *Egelhoff v. Egelhoff*, 121 S. Ct. 1322 (2001), which was ruled upon favorably. Wong frequently gives presentations on legislative issues surrounding retirement policy for organizations, including the American Bar Association and the International Foundation of Employee Benefits Plans.

Wong is admitted to the New York State Bar and the District of Columbia Bar and is also a member of the American Bar Association and the National Bar Association. She is a 1997 graduate of New York University School of Law, where she also received a Master of Laws in Taxation. Wong received a Bachelors of Arts in economics and African studies from Yale University.

Katie Mahoney

Executive Director, Health Policy

U.S. Chamber of Commerce

Katie W. Mahoney rejoined the U.S. Chamber of Commerce in June 2010. Mahoney has more than 13 years of health care experience in hospital and health plan operations, as well as health policy. She is responsible for developing, advocating, and publicizing the Chamber's policy on health and works with members of Congress, the administration, and regulatory agencies to promote the organization's health policy. Mahoney also crafts regulatory responses for the Chamber and its member companies and addresses material areas as part of a comprehensive health policy.

Mahoney joined the Chamber from the law firm of Greenberg Traurig where she served as assistant director of health and FDA business. While there, she analyzed legislative and regulatory health care proposals and advised insurers, health care providers, and employers on the respective business impact.

Previously, Mahoney worked at the U.S. Chamber as director of health care policy from 2004 to 2007. She focused on access to health coverage for small businesses and the uninsured, health plan mandates, ERISA preemption and regulatory requirements, COBRA, Medicare payment systems, retiree health coverage, medical liability reform, and health care quality improvement initiatives.

Mahoney has consulted on a variety of projects for state agencies and hospitals to maximize reimbursement and improve coverage among underserved populations, using public financing strategies. Her operational experience includes negotiating, implementing, and monitoring all managed care agreements with hospitals and health systems, large medical groups, and ancillaries in Southwest Central Louisiana on behalf of the largest single health carrier in the United States. She completed a postgraduate fellowship with the then-fully integrated Ochsner Health System, working at the executive level with chief executive officers at the Ochsner Health Plan, Ochsner Clinic, and Ochsner Foundation Hospital.

Originally from Massachusetts, Mahoney graduated cum laude from Vanderbilt University with an undergraduate degree in English literature. She earned a law degree and a master's degree in health administration from Tulane University's Schools of Law and Public Health and Tropical Medicine, respectively.

She lives in Rockville, Maryland, with her husband, Jason, twin sons, and a daughter.

Jennifer Pierotti

Senior Manager, Health Policy

U.S. Chamber of Commerce

Jennifer Pierotti joined the U.S. Chamber of Commerce in September 2010 as manager of Health Care Policy in the Labor, Immigration and Employee Benefits Division. She handles health care issues affecting employers and health sector members of the Chamber. In addition to researching and developing overall policy on health care reform, she focuses on health information technology, privacy issues, consumerism, comparative effectiveness research, and long-term care, among other areas. Pierotti regularly lobbies members of Congress on various Chamber priorities, including efforts to repeal the employer mandate and the health insurance tax. She also tracks regulations and helps craft regulatory comments and letters to Congress.

Prior to joining the Chamber, Pierotti was an associate at the firm Garrison & Sisson, specializing in legal market and small business policy research. During law school, she interned at the Senate Committee on Small Business and Entrepreneurship where she worked with legal counsel on health care and employment issues. Earlier, she served as a law clerk in the Government Affairs office of Altria Client Services. There she focused primarily on tax policy and legislative analysis.

Pierotti was a fellow at the Chamber in 2009 and focused on the health care reform process and small business employment concerns in the Congressional and Public Affairs Department.

A 2010 graduate of The Catholic University of America, Columbus School of Law, Pierotti served as Symposium Editor of the *Journal of Contemporary Health Law & Policy* and has been published on ERISA and tobacco policy issues. She received her B.A. in public interest policy, cum laude, from the University of Mary Washington in 2007. Pierotti is an active member of the District of Columbia Bar, Health Law Section, and the Junior League of Washington.

Michael P. Kreps

Senior Pension and Retirement Counsel

U.S. Senate Committee on Health, Education, Labor, and Pensions

Michael Kreps serves as Senior Pension and Retirement Counsel for the U.S. Senate Committee on Health, Education, Labor, and Pensions where he advises Chairman Tom Harkin on matters related to retirement policy. Michael has primary staff responsibility for pension legislation pending before the Committee, including amendments to the Employee Retirement Income Security Act of 1974, and manages the Committee's oversight of retirement-related executive agencies.

Most recently, Michael was involved in the development of the funding stabilization and Pension Benefit Guaranty Corporation reform provisions of the MAP-21 Act of 2012. He also worked on the Pension Relief Act of 2010 and the pension investment provisions of the Dodd-Frank Wall Street Reform and Consumer Protection Act.

Michael practiced law at the Groom Law Group in Washington, DC, before joining the HELP Committee staff. He advised employers, labor unions, plan trustees, and financial institutions on the fiduciary and prohibited transaction rules as well as plan funding, termination, and restructuring.

Michael holds a JD, with honors, from The George Washington University Law School and a BA, with distinction, in history and art history from the University of Colorado.

Andrew Banducci

Professional Staff Member

House Committee on Education and the Workforce

Andy Banducci is a Professional Staff Member for the House Committee on Education and the Workforce, where he focuses on employer-provided benefit plans. As a part of the committee's ERISA jurisdiction, the committee oversees the Pension Benefit Guaranty Corporation and the Department of Labor. A native of northwestern Pennsylvania, he attended Penn State and the University of Michigan Law School. After graduation, he entered private practice, specializing in various aspects of employee benefits law. He joined Chairman Kline's staff in 2011.

Judy Mares

Deputy Assistant Secretary for Policy
Employee Benefits Security Administration
U.S. Department of Labor

Judy Mares became EBSA's Deputy Assistant Secretary in October 2013. She joined EBSA after retiring from an extensive corporate career. Most recently, she was the Chief Investment Officer of Alliant Techsystems, Inc., where she managed the investments of the pension, savings, and VEBA plans (a total of \$4.2 billion in assets) for seven years. She also served as the CIO of Ameritech Corporation for five years and the Director of Benefit Finance at General Mills for twelve years. In addition, Mares was the President of Mares Financial Consulting for 13 years.

Prior to joining EBSA, Mares was the Defined Contribution Committee Chair of the Committee on the Investment of Employee Benefit Assets (CIEBA), and a member of the Plan Sponsor Advisory Committee of the Defined Contribution Institutional Investment Association (DCIIA). Mares was previously the Chair of the ERISA Advisory Council and a loaned executive to President Carter's Commission on Pension Policy. She earned a Bachelor's Degree in Mathematics from Purdue University and an MBA from the University of Illinois.

Amy Turner

Senior Advisor & Special Projects Manager

Employee Benefits Security Administration

U.S. Department of Labor

Ms. Turner is Senior Advisor and Special Projects Manager in the Office of Health Plan Standards and Compliance Assistance. She is responsible for managing regulations, interpretive guidance, and implementation activities for group health plans under Part 7 of Title I of the ERISA, as amended by the Affordable Care Act, the mental health parity provisions, the Genetic Information Nondiscrimination Act, and the HIPAA portability and nondiscrimination rules. Her responsibilities also include coordination with other Federal and State Agencies on implementation of non-ERISA provisions affecting employment-based group health coverage, including other Affordable Care Act provisions.

In recognition of her work, Ms. Turner has received the Secretary of Labor's Exceptional Achievement Award six times. She was also honored four times with the Secretary of Labor's Compliance Assistance Award of Excellence. Ms. Turner joined EBSA in 1996. Prior to that, she worked in the Department of Labor's Office of the Solicitor, Plan Benefits Security Division. Ms. Turner is a graduate of Cornell University's School of Industrial and Labor Relations and the George Washington University Law School. She is a frequent speaker on topics related to employment-based group health plan coverage.

Jay Khosla

Policy Director & Chief Health Counsel

Senate Committee on Finance

Jay Khosla currently serves as the Policy Director and Chief Health Counsel for the Republican staff of the Senate Finance Committee. He also serves as Legislative Director for Senator Orrin Hatch. During the 2008 presidential campaign, Mr. Khosla was Arizona Sen. John McCain's senior health policy advisor. Prior to the campaign, he served as senior health counsel for the U.S. Senate Budget Committee and prior to that as health counsel for former Senate Majority Leader William Frist. A Virginia native, he has his B.S. in biology from Virginia Commonwealth University, a J.D. from the University of Richmond's law school, and a master's degree in health administration from Virginia Commonwealth University's medical school.

Preston Rutledge

Tax and Benefits Counsel

Senate Committee on Finance

Preston Rutledge serves as Tax and Benefits Counsel on the Republican Tax Staff of the Senate Finance Committee for **Senator Orrin G. Hatch (R-UT) (Ranking Member)**.

Mr. Rutledge's responsibilities on the Committee include pensions and retirement savings, employee benefits, employment taxation, charities and tax-exempt organizations. Prior to joining the Committee, he worked in private law practice as an employee benefits counselor and litigator, and served for several years in the Tax Exempt and Government Entities Division of the Internal Revenue Service and the Office of Chief Counsel. Mr. Rutledge also served as an Officer in the U.S. Navy and as a law clerk on the U.S. Court of Appeals for the Fifth Circuit. He earned his B.S. in Finance, *cum laude*, from the University of Idaho; J.D., *with high honors*, from the George Washington University School of Law; and L.L.M. – Taxation, *with distinction*, from the Georgetown University School of Law.

Mark Iwry

Senior Advisor to the Secretary of the Treasury &
Deputy Assistant Secretary for Retirement and Health Policy
U.S. Department of the Treasury

J. Mark Iwry (pronounced “Eevry”) is Senior Advisor to the Secretary of the Treasury and is the Deputy Assistant Secretary for Retirement and Health Policy at the U.S. Treasury Department. Mark was previously a Nonresident Senior Fellow at the Brookings Institution, Research Professor at Georgetown University, Of Counsel to the law firm of Sullivan & Cromwell LLP, and a Principal of the Retirement Security Project. He was the Treasury Department’s Benefits Tax Counsel (1995-2001), serving as the principal official directly responsible for tax policy and regulation relating to the Nation’s qualified pension and 401(k) plans, employer health plans, deferred compensation, and other employee benefits. Previously, he was a partner in the law firm of Covington & Burling LLP.

Mark has often testified before congressional committees – representing the Treasury and Executive Branch or, while in the private sector, testifying as an independent expert -- and State legislatures. He has advised numerous Senators, Members of Congress and their staffs on both sides of the aisle, as well as various Presidential campaigns. In recent years has been recognized as one of the “30 top financial players” (*Smart Money* magazine), “100 Most Influential People in Finance” (*Treasury and Risk* magazine) (one of 5 in the field of Retirement and Benefits), “100 Most Influential People in the 401(k) Industry” (*401(k) Wire*), “*Investment News 20*” (20 individuals expected to have a major influence on the financial services industry), etc.

Formerly a chair of the D.C. Bar Employee Benefits Committee, and a member of the White House Task Force on Health Care Reform (1993-94), Mark’s books and articles include the co-edited volume (with William Gale and Peter Orszag), *Aging Gracefully: Ideas to Improve Retirement Security in America* (Century Fdn. Press, 2006).

A principal architect of the Saver’s Credit to expand 401(k) and IRA coverage of middle- and lower-income workers (claimed annually on some 6 million tax returns) and the “SIMPLE” IRA plan (covering an estimated 3 to 4 million workers), Mark co-authored President Obama’s legislative proposal to expand coverage through automatic IRAs. In the 1990s, he formulated and directed Treasury’s strategy to increase retirement saving by defining, approving and promoting 401(k) automatic enrollment (as well as automatic rollover to curtail pension leakage). He also has been centrally involved in developing or orchestrating many other significant improvements and simplifications of the nation’s pension and benefits systems, including expansion of automatic 401(k) features, promoting lifetime retirement income, IRS direct deposit of split income tax refunds into IRAs and US saving bonds, the “Universal Savings Accounts” proposal (1999-2000), payroll deduction IRAs, the small employer new plan tax credit, and the repeal of Code section 415(e).

While at Treasury in the 1990s, Mark was widely recognized for his work to expand coverage while simplifying and rationalizing benefits law and regulation. In 2001 he received the Secretary of the Treasury’s Exceptional Service Award “[i]n recognition of his outstanding leadership and accomplishmentsWidely respected as Treasury’s benefits and pension expert, Mr. Iwry excelled at building coalitions of diverse interests....” At Treasury, he worked closely with the private sector, Congress, and the IRS, held town hall meetings around the country, and received a special award from the IRS “[i]n recognition of the collegial working relationship you have fostered between [Treasury] and the IRS Office of Chief Counsel and of your many contributions to our nation’s tax system.”

Mark is an honors graduate of Harvard College and Harvard Law School, received a Masters in Public Policy from Harvard's Kennedy School, and is listed in *Who's Who*, *Best Lawyers in America*, *Washington DC Super Lawyers*, etc. He is a Fellow of the American College of Employee Benefits Counsel and a member of the bar of the U.S. Supreme Court.