INITIATIVE ON FINANCIAL SECURITY
THE ASPEN INSTITUTE

Tapping Tax Time

Hosted by the Aspen Institute Initiative on Financial Security

A panel briefing discussing how the United States Treasury Department's new and ongoing initiatives are leveraging the tax time moment to encourage, inform, and empower Americans to build their financial security.

Michael Barr, Assistant Secretary for Financial Institutions
United States Treasury Department

Michael Barr serves as the Department of the Treasury's Assistant Secretary for Financial Institutions. Barr previously served as Treasury Secretary Robert E. Rubin's Special Assistant, as Deputy Assistant Secretary of the Treasury, as Special Advisor to President William J. Clinton, as a special advisor and counselor on the policy planning staff at the State Department, and as a law clerk to U.S. Supreme Court Justice David H. Souter and then-District Court Judge Pierre N. Leval of the Southern District of New York. Barr has taught Financial Institutions, International Finance, Transnational Law, and Jurisdiction and Choice of Law, and co-founded the International Transactions Clinic at the University of Michigan Law School. He has also served as a Senior Fellow at the Center for American Progress and at the Brookings Institution. Barr has conducted large-scale empirical research regarding financial services and low- and moderate-income households. Barr recently co-edited Building Inclusive Financial Systems and Insufficient Funds. Barr received his J.D. from Yale Law School, an M. Phil in International Relations from Magdalen College, Oxford University, as a Rhodes Scholar, and his B.A., summa cum laude, with Honors in History, from Yale University.

J. Mark Iwry, Senior Advisor to the Secretary & Deputy Assistant Secretary for Retirement and Health Policy
United States Treasury Department

J. Mark Iwry is the Senior Advisor to the Secretary and Deputy Assistant Treasury Secretary under US Treasury Secretary Timothy Geithner. In this position, Mr. Iwry is responsible for executive compensation, pensions, retirement savings and health care. Iwry also acts as a Senior Advisor to The Retirement Security Project, a Nonresident Senior Fellow at the Brookings Institution, and as a Research Professor in Public Policy at Georgetown University. Mr. Iwry served as the Benefits Tax Counsel at the U.S. Treasury Department where he was a principal architect of the Saver's Credit to expand 401(k) and IRA coverage of middle- and lower-income workers and the "SIMPLE" 401(k)-type plan. He was also centrally involved in developing the sweeping Presidential proposals to expand coverage through "Universal Savings Accounts" and related provisions. Mr. Iwry is an honors graduate of Harvard College and Harvard Law School and has a Master of Public Policy degree from Harvard's Kennedy School of Government.

The Aspen Institute Initiative on Financial Security is a leading policy program focused on bold solutions to help all Americans at every stage of life to save, invest, and own.

Lisa Mensah, Executive Director
Aspen Institute Initiative on Financial Security

Lisa Mensah is an expert in using financial tools to improve the economic security of the working poor. At Aspen IFS, Ms. Mensah leads an advisory board of corporate executives and experts to explore financial products that build wealth from birth to retirement for America's working families. Ms. Mensah began her career in commercial banking at Citibank prior to working 13 years with the Ford Foundation. Serving as Deputy Director of Economic Development for the organization, Ms. Mensah led the Foundation's work in microfinance and women's economic development. She became the leading national funder of individual development accounts (IDAs) – an innovative savings account structured with matching incentives and personal financial training used to finance homeownership, entrepreneurship and education. Under Ms. Mensah's leadership, IDAs grew from an experiment at a handful of sites to become a tool used by hundreds of community organizations in all 50 states. Ms. Mensah holds an M.A. from the Paul H. Nitze School of Advanced International Studies of The Johns Hopkins University and a B.A. from Harvard University.

Peter Tufano, Sylvan C. Coleman Professor of Financial Management
Harvard Business School

Peter Tufano is the Sylvan C. Coleman Professor of Financial Management at the Harvard Business School. He previously served as the as the school's Senior Associate Dean for Planning and University Affairs, its Director of Faculty Development, and Head of the Finance Unit. His research and course development focus on mutual funds, corporate financial engineering, and consumer finance. Tufano is the coordinator of the HBS Executive Education program on Consumer Finance and in 2009 launched a joint MBA-JD course on Consumer Finance with Howell Jackson (HLS). He founded Doorways to Dreams Fund, Inc., a nonprofit R&D lab that translates these ideas into practice in partnership with businesses and policymakers. Tufano is also a Research Associate at the National Bureau of Economic Research and co-chairs its working group on Household Finance. He serves on several non-profit, research, university, and government advisory boards. Before joining the HBS faculty in 1989, Tufano earned his Ph.D. in Business Economics from Harvard University; his MBA from HBS, with high distinction as a Baker Scholar; and his A.B. degree in economics, summa cum laude, from Harvard College.

Robert Weinberger, Senior Fellow
Aspen Institute Initiative on Financial Security

Robert Weinberger specializes in tax and financial services policy. Mr. Weinberger is the former Vice President for Government Relations for H&R Block, Inc. His responsibilities included liaison with the White House, the Treasury Department, IRS, Congress and business, consumer and public policy groups. Earlier in his career, Mr. Weinberger served in federal and state government – at the White House and Department of Commerce and Transportation, and as General Counsel to the Illinois State Comptroller – before leading government relations and public policy as an executive at Continental Bank, Unilever United States, and finally H&R Block, from which he retired in 2009. Mr. Weinberger graduated from Oberlin College and the University of Illinois College of Law. In addition, he studied at the University of Illinois Institute of Government and Public Affairs and at Harvard's Kennedy School of Government.

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