



**Bill Shipman** is chairman of CarriageOaks Partners LLC a Massachusetts-based consulting firm specializing in retirement finance. An advocate of Social Security reform in the United States, Shipman has testified before the House Ways and Means Sub-Committee on Social Security and co-authored Promises to Keep: Saving Social Security's Dream. He is co-chairman of the Cato Project on Social Security Choice and was on the National Advisory Board of "Americans Discuss Social Security," a non-profit organization funded by the Pew Charitable Trusts to generate informed debate on the issue. He also served as a delegate to the White House Conference on Social Security. His research has been published by the Financial Analysts Journal, The Journal of Investing, The Wall Street Journal, the National Center for Policy Analysis, The Heritage Foundation and the Cato Institute as well as numerous other publications and was named one of its outstanding papers by The Journal of Investing.

Shipman has discussed and debated public policy issues before the United Nations and both the Joint Economic Committee and House Budget Committee Task Force on Social Security of the United States Congress as well as the Australian Parliament. He has given well over 300 speeches across six continents and twenty-one countries and has consulted on retirement finance reform with government officials from Australia, China, Poland, the United States and Russia as well as the European Commission. He recently was invited by the government of the Russian Federation to be a member of its Supervisory Council for the Institute for Social Insurance Development. And the Ministry of Labour and Social Security of the People's Republic of China has invited him to be a visiting professor at th...

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### Speech Topics

- Globalization
- Global
- Futurist
- Finance
- Economics

