

EBRI-ERF Policy Forum #74

Arnold & Porter LLP

555 Twelfth Street, NW Washington, DC 20004-1206

Thursday, May 15, 2014

9:00 a.m. – 12:30 p.m. (refreshments served at 8:30 a.m.)

Agenda

“Crisis” Management: Uncertainty and the Workplace

Setting the Stage: Research Perspectives from EBRI

PANEL 1: Never Let a (Retirement) Crisis Go to Waste: What’s Broken, What’s Not, and What to Do About It (or Not)

Moderator: Jack VanDerhei (EBRI)

- Peggy Collins (Bloomberg)
- Doug Fisher (Fidelity)
- Sarah Holden (ICI)
- Diane Oakley (NIRS)

Networking Break

PANEL 2: Be Careful What You Wish For: The Impact of the ACA on Employment-Based Health Benefits

Moderator: Paul Fronstin (EBRI)

- Joe Antos (AEI)
- Chris Jennings (Jennings Policy Strategies, Inc. and Former Deputy Assistant to the President for Health Policy)
- Noam Levey (LA Times)

PANEL 3: Healthy, Wealthy, and Why – In the Midst of Uncertainty, Can Financial Wellness Work?

Moderator: Nevin Adams (EBRI)

- Kent Allison (PwC)
- Suzanna de Baca (Ameriprise)
- Liz Davidson (Financial Finesse)
- Mary Beth Franklin (Investment News)
- Joleen Workman (Principal)

Closing Remarks – Nevin Adams (EBRI)