



A Program of Employee Benefit Research Institute

## Fall American Savings Education Council Meeting

Wednesday, October 14, 9:00 am to 1:00 pm

Virtual

### AGENDA

9:00 am – 9:05 am **Welcome and Introduction**

9:05 am – 10:00 am **Financial Wellness — The Intersection of What Employees Need and What Employers are Willing to Provide**

In this session, we'll explore the findings of two companion surveys fielded in the heart of COVID-19: The Workplace Wellness Survey examines employees' desire for specific benefits associated with financial wellness, benefits decision-making, and sources of help navigating the pandemic. The Employer Perspectives on Financial Wellness Survey explores trends in employer strategies for offering employee financial wellness initiatives, motivations for supporting these programs, and approaches to measuring success.

[Craig Copeland](#), Senior Research Associate, EBRI

[Paul Fronstin](#), Director of the Health Research and Education Program, EBRI

[Susan Weinstock](#), Vice President, Financial Resilience Programming at AARP, moderator

10:00 am – 10:45 am **Creating Paths of Least Resistance for Higher Savings Levels: New Models in Behavioral Science**

Using behavioral science in financial education can measurably improve savings outcomes. In this session, we start with an overview of key behavioral insights and then apply them to new approaches for reaching employees who are not currently saving for retirement. These approaches show promise in groups that have historically been more challenging to engage.

[Beth Perry](#), Social Scientist, Federal Retirement Thrift Investment Board

[Gary Mottola](#), Research Director, Investor Education, FINRA, moderator

10:45 am – 11:00 am Break

11:00 am – 12:00 pm **Views from the Front: Insights on Guiding Employees Through the Turbulence of the Current Environment**

In this session, hear from those in the trenches directly serving workers struggling with the emotional and financial challenges caused by the pandemic. Today's “new normal” includes recent market volatility, layoffs and furloughs, stay-at-home orders, early retirement, lack of emergency savings, and more. What are employers, financial advisers, and others hearing, and how they are helping people navigate both the financial and the emotional toll the pandemic is taking?

[Dan Eck](#), Managing Director, EY Personal Finance

[Michelle Singletary](#), Nationally Syndicated Personal Finance Columnist, Washington Post

[Walter Kelleher](#), Director of Educational Services, Florida State Board of Administration

**Matt Petersen**, Executive Director, NAGDCA, moderator

12:00 pm – 1:00 pm **ASEC Partner Updates**