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EBRI Names New Board of Trustee Leaders

Washington, D.C. – December 17, 2020 – The Employee Benefit Research Institute recently named a new slate of leaders to its Board of Trustees. All will be serving two-year terms that end in December 2022.

Chair, Board of Trustees

Joshua R. Cohen, CFA, Head of Institutional Defined Contribution, PGIM, is Managing Director in the organization's Institutional Relationship Group (IRG), delivering expert counsel and innovative retirement solutions to large Defined Contribution plans. Cohen is focused on a range of investment issues including plan design, Qualified Default Investment Alternatives (QDIAs), implications of regulatory change and solving for retirement income. Cohen most recently served as Vice Chair of EBRI, and previously chaired the organization's research committee.

"I have worked with Josh in many capacities over the years and am looking forward to his leadership of EBRI's Board," said Lori Lucas, EBRI President and CEO. "Josh can always be counted on to offer perceptive, nuanced insights and candid perspective. He truly understands EBRI, its mission, and its vision, and will be invaluable in helping to guide us as we continue to take on new challenges such as consumer behavior, financial well-being, and public DC plan research."

Cohen succeeds Stacy Schaus, Founder and CEO of The Schaus Group, who will remain actively involved on EBRI's executive committee as the Immediate Past Chair.

"EBRI is extremely grateful for many years of dedicated service Stacy has offered the organization and we're pleased she agreed to continue to be engaged on our Executive Committee as Past Chair," said Lucas. "Her exceptional leadership, vision and energy have been critical during a pivotal time in the organization's history. Stacy will leave a positive imprint on EBRI for decades to come."

Vice Chair, Board of Trustees

Neil Lloyd, Partner, Head of U.S. DC and financial wellness research at Mercer, is a member of the Mercer DC Committee, the Mercer DC Investment Committee and several strategic research teams, including the U.S. Target Date Fund Strategic Research team. Lloyd is a regular speaker at national and regional industry forums. He recently completed a two-year term serving as chair of EBRI's research committee.

“Neil Lloyd is a force of nature, delving into EBRI research and programs with unparalleled vigor and thoughtfulness,” said Lucas. “We are glad he is able to continue to serve EBRI in the vice chair role, supporting Josh and continuing to help build an ever stronger EBRI.”

Lloyd succeeds Cohen, who is being elevated to Chair of the Board of Trustees.

Chair, Research Committee

P. Brett Hammond, Ph.D. is Research Leader of the Client Analytics Group at the Capital Group and editor of *The Journal of Retirement*. His research interests include finance, higher education, and public policy. Hammond has been a prolific EBRI volunteer, serving on its research committee and public policy advisory council, and is a frequent speaker and moderator of EBRI programs.

“Brett’s keen research and public policy acumen uniquely positions him to be the new chair of EBRI’s research committee,” said Lucas. “We are looking forward to having him in a leadership role shaping the future of EBRI’s research agenda, ensuring that it is comprehensive, relevant, and actionable.”

Hammond fills the void left by Lloyd’s elevation to Vice Chair of the Board of Trustees.

Executive Committee

EBRI’s Board of Trustees also named Kelly O’Donnell, EVP and Head of Workplace for Edelman Financial Engines, a top independent financial planning and investment advisor, to its Executive Committee. O’Donnell leads the marketing, product and strategy initiatives to deliver financial well-being services to leading employers and more than 10 million plan participants. O’Donnell replaces industry veteran Judith Mares, who completes a two-year term at the end of 2020, and was recognized for her considerable contributions at a December 9th Board of Trustees Meeting.

“EBRI is excited to add Kelly to our volunteer leadership team,” said Lucas. “In addition to her leadership abilities, Kelly brings essential technology expertise that can help inform the ongoing evolution of EBRI’s models and databases.”

About EBRI

The Employee Benefit Research Institute is a private, nonpartisan, nonprofit research institute based in Washington, DC, that focuses on health, savings, retirement, and financial security issues. EBRI does not lobby and does not take policy positions. The work of EBRI is made possible by funding from its members and sponsors, who include a broad range of public, private, for-profit and nonprofit organizations. For more information visit www.ebri.org.