

## **EBRI Announces Upcoming Retirement of President and CEO Lori Lucas**

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For more information: Ron Dresner

[dresner@ebri.org](mailto:dresner@ebri.org)

(Washington, D.C.) – The Employee Benefit Research Institute (EBRI) announced today the upcoming retirement of Lori Lucas as its President and CEO. Lucas, who has led EBRI for nearly five years, will continue in her current role through the end of 2022. She is actively involved in the organization’s search for and transition to a new leader, and she will continue to be fully engaged in leading the EBRI team and serving member needs through the end of the year.

Lucas’ history with EBRI dates back to 1999, and before signing on as President and CEO in 2018, she held roles that included Vice Chair and Research Chair. Lucas coincidentally began her tenure as EBRI President and CEO in the same year the organization celebrated its 40th anniversary, and she was instrumental in implementing a new vision — one that took EBRI into the future while honoring and preserving the organization’s deep history, founding mission and established reputation as the premier research organization across all aspects of the employee benefits space.

“Lori came in with a deep respect for EBRI and its mission, as well as an understanding of the quickly shifting paradigms and emerging trends that were redefining the employer/employee benefits industry,” said Joshua Cohen, chair of the EBRI Board of Trustees. “Her approach enabled us to stay nimble, responsive, accessible and relevant to our members, and to employers, policy makers, individual workers and the media.”

In addition to the SECURE Act and the impacts of the COVID-19 pandemic, Lucas ensured EBRI’s research agenda reflected the employee benefits environment, in real time. Under her leadership, EBRI produced objective, fact-based research and analysis on topics such as the emergence of gig workers, unique needs of Millennials, gaps in retirement plan coverage, the Baby Boomer retirement era, and expanding the traditional definition of employee benefits to include student loans, emergency funds and other aspects that contribute to overall financial wellness.

Also key among her many contributions was her work to redesign EBRI’s membership structure, paving the way for connections with new companies and industries while enhancing opportunities for members to pursue more tailored research.

“A hallmark of EBRI has always been its one-of-a-kind empirical databases,” said Cohen. “Lori built on that existing infrastructure and guided the team to develop new databases, ultimately giving us a more comprehensive view of workplace wellness. That innovation means EBRI is well-positioned to deliver top-quality research far into the future.”

The EBRI Executive Committee has begun a national search for their new CEO and President. Desired candidates will have experience in organizational leadership and growth, employee benefits research, market and member relations, and public policy. Lucas will also participate in and provide input on the search, and following her official retirement, she will assume the role of CEO Emeritus, an opportunity that will allow Lucas to stay connected to the EBRI organization.

“I told the team that this isn’t goodbye, just the start of a new chapter for EBRI and for me, personally,” said Lucas. “It has been a great honor to lead this mission-focused organization, to build relationships with our members, and to have the opportunity to work alongside a team of professionals whose expertise, dedication and work product is truly unparalleled.”

The Employee Benefit Research Institute is a non-profit, independent and unbiased resource organization that provides the most authoritative and object information about critical issues relating to employee benefit programs in the United States. For more information, visit [www.ebri.org](http://www.ebri.org).