

Employee Benefit Research Institute Makes New Appointments to Board of Trustees, Executive and Research Committees

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(Washington, D.C.) – The Employee Benefit Research Institute (EBRI) announced today the following appointments to the organization’s Board of Trustees, Executive and Research Committees:

- Sandy McCarthy, OneAmerica Financial – Chair, Board of Trustees and Executive Committee
- Jon Kessler, HealthEquity – Vice Chair, Board of Trustees and Executive Committee
- Josh Cohen, PGIM - Emeritus, Executive Committee*
- Lisa Margeson, Bank of America – Chair, Research Committee
- Katie Hockenmaier, Mercer – At Large, Executive Committee
- Ed Murphy, Empower – At Large, Executive Committee
- Kelly O’Donnell, Edelman Financial Engines – At Large, Executive Committee*
- Sri Reddy, Principal Financial – At Large, Executive Committee
- Justin Roberts, Amazon – At Large, Executive Committee
- Dan Rosshirt, Deloitte Consulting – At Large, Executive Committee
- Tami Simon, Segal Company – At Large, Executive Committee
- Eric Stevenson, Nationwide – At Large, Executive Committee

Aside from noted exceptions, all terms end 12/2025.

*Term ends 12/2024.

“It’s an honor to have such an impressive group of industry leaders filling these critical roles,” said Barb Marder, president and CEO at EBRI. “Their understanding of EBRI and support of its mission, paired with their invaluable experience, insights and fresh perspectives, will help continue to grow EBRI’s reach and value we deliver for our members and the industry.”

Sandy McCarthy, president of Retirement Services at OneAmerica Financial, will chair EBRI’s Board of Trustees and lead the Executive Committee. She succeeds past chair Josh Cohen, managing director at PGIM. Cohen will continue to stay involved with the Executive Committee and serve as Emeritus. Jon Kessler, president and CEO at HealthEquity, will begin his role as vice chair.

“This is a very special time for EBRI,” said McCarthy. “The organization has always played a significant and vital role in the retirement and employee benefits landscape, and that won’t change. But there’s also a sense of forward-looking energy and optimism about taking EBRI to the next level and continuing to amplify and enhance its impact. There’s incredible opportunity ahead, and I’m honored to be a part of EBRI’s next chapter.”

McCarthy, who previously served as vice chair on EBRI’s Executive Committee, also noted her gratitude and respect for past and current EBRI board and committee leadership. “It’s been incredibly fulfilling to be a part of EBRI’s board, and to work alongside a team that’s dedication and passion for EBRI is unmatched. I have been and continue to be impressed and inspired by every one of these industry leaders,” said McCarthy. “I also want to specially recognize and thank Josh Cohen, who chaired the board during a milestone year, as EBRI marked its 45th anniversary and welcomed a new CEO. Josh’s leadership was truly remarkable.”

The Employee Benefit Research Institute is a non-profit, independent and unbiased research organization that provides the most authoritative and objective information about critical issues relating to employee benefit programs in the United States. For more information, visit www.ebri.org.