



## 2020 Financial Wellbeing Symposium

### Virtual Meeting Series

#### Moderated by:

**Lori Lucas**, President and CEO, Employee Benefit Research Institute

**Greg Ward**, Director, Financial Wellness Think Tank, Financial Finesse

#### AGENDA

**Sept. 22 1:00 – 2:00 p.m. 2020 Financial Wellness Survey: Employer Perspectives with Special Focus on the Impact of COVID-19**

In its third year, EBRI's Financial Wellness Survey: Employer Perspectives was fielded during the heart of the pandemic. Find out how employers are adapting their financial wellness solutions to their employees evolving needs—and their own new budgeting constraints. Learn how everything from emergency savings initiatives to student loan debt assistance are being adapted to the current environment. Panelists will explain what they are hearing from employers on the ground, and how they are helping employers navigate the current crisis.

Speakers:

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

[Meghan Belinski](#), VP Strategy, Financial Wellness & Engagement, MetLife,  
Moderator

**Sept. 22 2:00 – 2:30 p.m. Financial Wellbeing Research Center Breakout Discussion Groups (Financial Wellness Research Center Members and their guests only)**

Speakers:

Track 1: Changes in Approaches to Financial Wellbeing Offerings Post-COVID-19  
(Led by [Julie Stich](#), Vice President, Content, International Foundation of Employee Benefit Plans)

Track 2: The Current State of Student Loan Debt and Emergency Savings Offerings (Led by [Sharon Carson](#), Executive Director, J.P. Morgan Asset Management)

Track 3: Objectives, Implementation, and Measurement of Financial Wellness Strategies (Led by [Lisa Canafax](#), Wealth Strategist, Mercer)

**Sept. 23 1:00 – 2:30 p.m. The New Frontier: Virtually Engaging Employees in Financial Wellness Initiatives**

Social distancing has changed the way we engage in many facets of life—including engaging workers in financial wellness initiatives. This panel will address innovative ways of reaching employees through technology, including approaches that best suit various demographic groups. We will then split into breakout groups for interactive discussions on real-world approaches that FWRC members have employed with success. A report out to the broader group will happen at the end of the session.

**Half-hour discussion to follow main one-hour panel.**

Speakers:

[Kathy Floyd](#), Senior Vice President: Education & Wellness, Church Pension Group

[Beth Conradson Cleary](#), Executive Director, City of Milwaukee 457(b) Deferred Compensation Plan

[John Crittenden](#), Fintech Entrepreneur

[Jim Mahaney](#), Vice President, Strategic Initiatives at Prudential, Moderator

**Sept. 25 1:00 – 2:30 p.m. Weathering the Storm: Steps Employers are Taking to Facilitate Employee Resilience During Times of Crisis**

The pandemic has tested both the financial and the mental resilience of American workers. In this session, experts will address their approaches to “psychological first aid” for employees under mental duress. We will then split into breakout groups for interactive discussions on real-world approaches that FWRC members have employed with success. A report out to the broader group will happen at the end of the session.

**Half-hour discussion to follow main one-hour panel.**

Speakers:

[Greg DeLapp](#), CEO, EAPA

[Erlinda Vo](#), Financial Wellness Help Recipient

[Andrew Lendnal](#), Executive Director, Morgan Stanley

[Greg Ward](#), Director, Financial Wellness Think Tank, Financial Finesse, moderator