



90TH PUBLIC POLICY FORUM
DECEMBER 6, 7, AND 9, 2021

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EBRI'S MISSION

EBRI produces and communicates independent, objective, nonpartisan data, research, and other information about employee benefits. The organization serves the public, employers, service providers, workers and their families, and policymakers.

MEMBER WORDS THAT DESCRIBE EBRI



EBRI'S 90TH POLICY FORUM

- Monday, December 6 — **Keynote: Department of Labor Update With Kathleen Kennedy Townsend**
- A Path to a More Equitable Solution: Solving the Retirement Coverage Gap**
- Tuesday, December 7 — **Spending in Retirement: The Full Picture**
- Thursday, December 9 — **Health Care Reform Redux: How Might Legislative and Regulatory Action Drive Change?**

THANK YOU, POLICY FORUM DEVELOPMENT TASK FORCE!

Vice Chair, PPAC: Liz Varley, Ameriprise Financial

Task Force:

Nevin Adams, American Retirement Association

Reagan Anderson, Capital Group

Rhonda Berg, Mercer

Nicky Brown, HealthEquity, Inc.

Chris Byrd, WEX Health

Rob Capone, Legal & General Investment Management America

Kathryn Carleson, HealthEquity, Inc.

Drew Carrington, Franklin Templeton

Kelsey Chin, Millennium Trust Company

Josh Cohen, PGIM

David Cruz, New York Life

Liz Davidson, Financial Finesse, Inc.

Mark Dennis, Financial Finesse, Inc.

Jody Dietel, HealthEquity, Inc.

Bob Doyle, Prudential Retirement

Jennifer Flodin, Mercer

Josh Freely, TIAA

Kris Haltmeyer, Blue Cross Blue Shield Association

Katie Hockenmaier, Mercer

Bob Holcomb, Empower Retirement

Sarah Holden, Investment Company Institute

Kirsten Hunter, Fidelity Investments

Tom Johnson, Retirement Clearinghouse

Melissa Kahn, State Street Corporation

Marla Kreindler, Morgan, Lewis & Bockius LLP

Mike Lanza, Ameriprise Financial

Lisa Margeson, Bank of America

Martin McGuinness, Unum

Ed Murphy, Empower Retirement

Meenu Natarajan, Mercer

Chantel Sheaks, U.S. Chamber of Commerce

Mike Skinner, T. Rowe Price

Kevin Smart, Custodia

Michael Sowa, Benetic

Jana Steele, Callan Associates, Inc.

Christopher T. Stephen, National Rural Electric Cooperative Association

Aron Szapiro, Morningstar

Renee Wilder Guerin, Retirement Clearinghouse LLC

SPENDING IN RETIREMENT: THE FULL PICTURE

“My parents won’t throw out a cup of coffee. They save it for the next day. . .”

“My Dad agonized over how much to spend each month until I persuaded him just to create a monthly retirement “paycheck” for himself.”

“Most retirees say they prefer to preserve or maintain their retirement nest-egg—just in case of an emergency—rather than spend it on things today.”

“Many retirees rate their retirement satisfaction as pretty good, even though they wish they’d saved more for retirement.”

What are we missing?

SPENDING IN RETIREMENT: THE FULL PICTURE



Tamiko Toland,
Director, Retirement
Markets, Cannex



Steve Vernon,
President, Rest-of-
Life Communications



Ali Ahmed,
Director, Thought
Leadership, Fidelity



**Moderated by: Lori
Lucas,** President
and CEO, EBRI

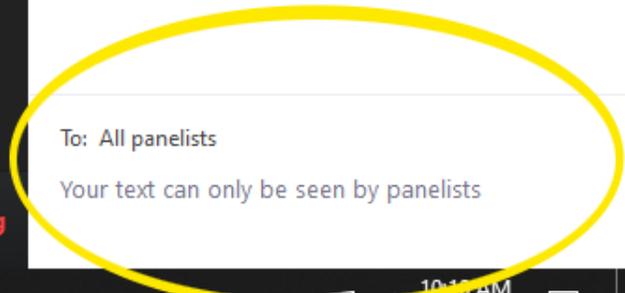
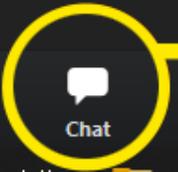
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John Doe

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THURSDAY'S EVENT

Register at
ebri.org

EBRI WINTER POLICY FORUM WEBINAR

DECEMBER 9, 2021

2:00–3:00 P.M.

Health Care Reform Redux: How Might Legislative and Regulatory Action Drive Change?

Featuring:

Annette Guarisco Fildes, President and CEO, The ERISA Industry Committee

Kathy Bakich, Senior Vice President, Health Compliance Practice Leader, Segal

Kris Haltmeyer, Vice President, Legislative and Regulatory Policy, Blue Cross Blue Shield

Paul Fronstin, Director of the Health Research and Education Program, EBRI, Moderator

UPCOMING EBRI PROGRAMS

Webinar: Generational Differences in Wealth – January 19, 2022

Webinar: Workplace Wellness Survey Core Findings – February 2, 2022

Webinar: Workplace Wellness Survey Race & Ethnicity Findings – February 23, 2022

Webinar: Members Only Research Round Up – March 9, 2022

Webinar: Retirement Income Security of Public Employees – March 16, 2022

Webinar: Health Savings Account Data Update – March 30, 2022

Webinar: EBRI/ICI 401(k) Contribution Analysis – April 20, 2022

Washington, DC: May Policy Forum – May 13, 2021

Please visit ebri.org for more information.

Support EBRI by joining today: Contact Betsy Jaffe, jaffe@ebri.org

