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.
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 Halmeyer, 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 McGuiness, 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
“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
Click this button

Type question(s) here

To: All panelists
Your text can only be seen by panelists
THURSDAY’S EVENT

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

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