

EBRI-ERF POLICY FORUM #84 RETIREMENT, HEALTH, AND FINANCIAL WELLBEING

DECEMBER 13, 2018

EBRI WAS STARTED IN 1978...

40
YEARS
Anniversary

EBRI
EMPLOYEE BENEFIT
RESEARCH INSTITUTE

WHAT DID THE WORKFORCE LOOK
LIKE THEN?

1978: CUBICLES WEREN'T SO COMMON



1978: THERE WERE FEWER WOMEN IN THE WORKFORCE



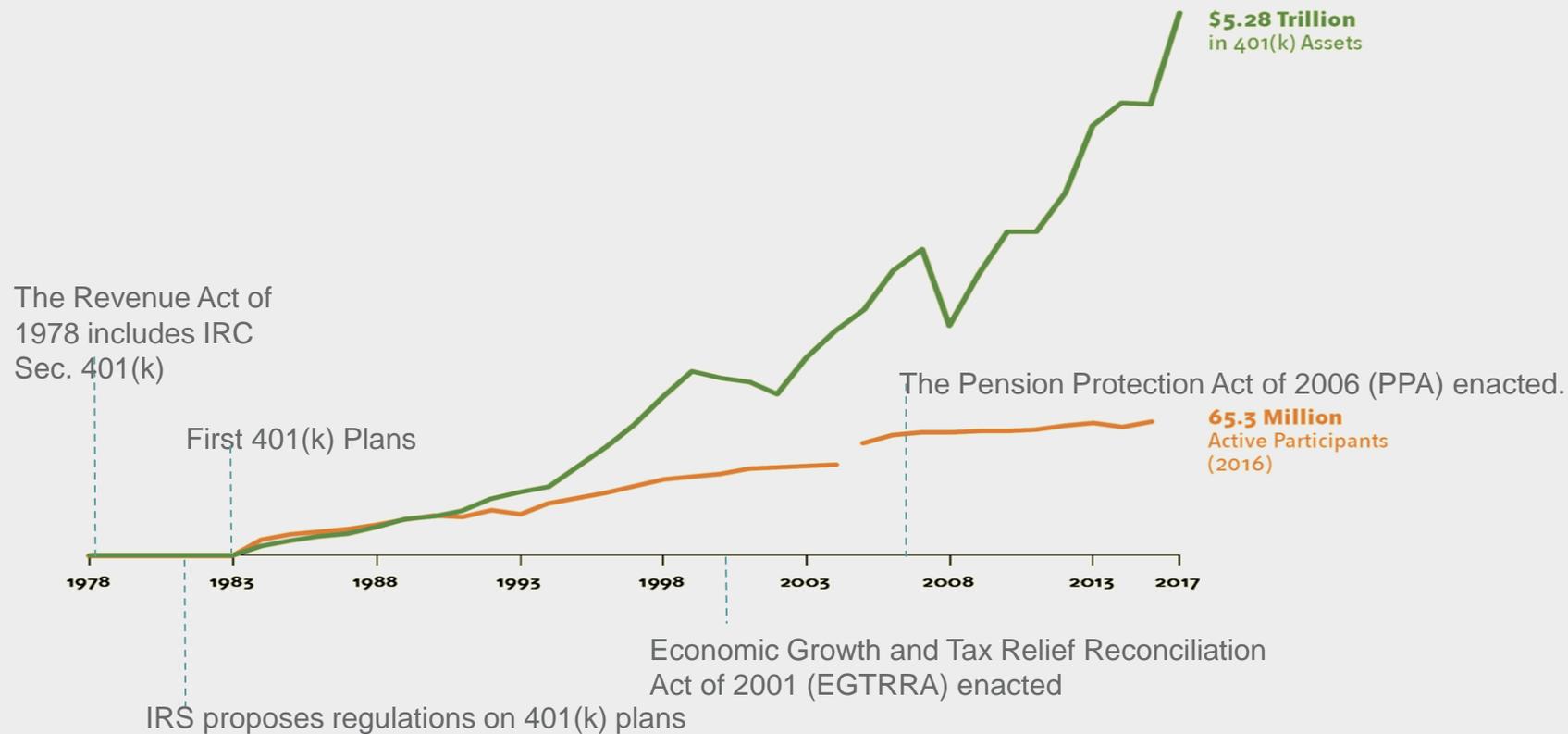
1978: IT WAS BEFORE THE PERSONAL COMPUTER



1978: AND BEFORE EMAIL AND CELL PHONES



1978: ALSO IT WAS THE YEAR 401(K) PLANS WERE BORN



WHAT DOES THE FUTURE HOLD?

Financial Wellness

Retirement Income

Employment-Based Health Benefits System

AGENDA

- 8:30 Welcome
- 8:45 How Do Financial Wellness Initiatives Move the Dial?
- 9:45 Considerations the Retirement Income Phase of Life (Account Balances, Income Streams, and RMDs! Oh my!)
- 10:45 Networking Break
- 11:15 What Does the Future Hold for the Employment-Based Health Benefits System?
- 12:45 Networking Lunch
- 1:15 Policy Keynote
- 1:50 Wrap Up
- 2:00 Adjourn

THANK YOU POLICY FORUM DEVELOPMENT TASK FORCE!

Michael Doshier, Franklin Templeton

Tom Johnson, Retirement Clearinghouse

Liz Varley, Ameriprise Financial, Inc.

Sarah Holden, Investment Company Institute

Josh Freely, TIAA

Bob Holcomb, Empower Retirement

Kris Haltmeyer, Blue Cross Blue Shield Association

David Guilmette, CIGNA

Stacy Scapino, Mercer

Aron Szapiro, Morningstar, Inc.

Karl Paulson, Public Employees' Retirement Association of Colorado

Melissa Kahn, State Street Global Advisors

Bob Doyle, Prudential Financial

A hand holding a silver pen points to a whiteboard with a black border. The whiteboard contains the following text: "Wi-Fi Network: DCCTR", "Password: meeting2015DC", and a Twitter logo followed by "#EBRIPolicyForum". The whiteboard is on a white desk with a laptop, a glass of water, a coffee cup, and a black device nearby.

Wi-Fi Network: DCCTR
Password: meeting2015DC

 #EBRIPolicyForum

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