GET READY FOR THE PATH FORWARD!

Monday, May 10 — Department of Labor: The Next Four Years and Lessons Learned From COVID-19: State of Retirement

Tuesday, May 11 — Emergency Saving and Financial Resilience: The Role of the Employer

Thursday, May 13 — Tearing Down the ACA Firewall: Implications for Employment-Based Health Benefits Under the Biden Health Care Plan
THANK YOU, POLICY FORUM DEVELOPMENT TASK FORCE!

Vice Chair, PPAC: Liz Varley, Ameriprise Financial

Task Force:

Nevin Adams, ARA
Chris Byrd, Wex Health
Drew Carrington, Franklin Templeton
Kelsey Chin, Millennium Trust
Michael Doshier, T. Rowe Price
Bob Doyle, Prudential
Kris Haltmeyer, Blue Cross Blue Shield Association
Joe Healy, PIMCO
Kirsten Hunter, Fidelity

Tom Johnson, Retirement Clearinghouse
Melissa Kahn, State Street Global Advisors
Gary Koenig, AARP
Alison Moore, HealthSavings Administrators
Chantel Sheaks, U.S. Chamber of Commerce
Mike Skinner, T Rowe Price
Michael Sowa, LGIMA
Jana Steele, Callan
Aron Szapiro, Morningstar
DEPARTMENT OF LABOR: THE NEXT FOUR YEARS

Ali Khawar, Principal Deputy Assistant Secretary, Department of Labor

Moderated by: Lori Lucas, President and CEO, Employee Benefit Research Institute
POLLING QUESTION
PLEASE SHARE YOUR THOUGHTS
POLLLING QUESTION
PLEASE SHARE YOUR THOUGHTS
SPOT Survey Results – CARES Act

• PSCA Survey of Plan Sponsors on CARES Act Provisions
  – 90% of Respondents Stated that the % of Participants taking a COVID Distribution was 5% or less.
  – 26.1% of Respondents Stated they Did NOT Enact Any of the Optional Provisions under the CARES Act.
  – 91.2% of All Plans Did NOT Make Any Change to Employer Contributions as a Result of COVID-19 Pandemic
    • Compared to 55% of All Plans that Did Not Make Any Change to Employer Contributions as a Result of 08/09 Economic Downturn

• Takeaways
  – Limited Impact at Early Stages of Pandemic
  – Too Early to Tell of Impact on Retirement?

Click HERE for Survey Results
TOMORROW’S EVENT

EBRI SPRING POLICY FORUM WEBINAR
MAY 11, 2021
2:00–3:15 P.M.

Emergency Saving and Financial Resilience: The Role of the Employer

Featuring:
Sarah Holden, Senior Director, Retirement & Investor Research, Investment Company Institute
Heidi Johnson, Director of Behavioral Economics, Financial Health Network
Diana Rucci, Director, Product Development, Prudential Financial
Craig Copeland, Senior Research Associate, Employee Benefit Research Institute, Moderator
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