

EBRI Board Meeting

Wednesday, December 9, 2020

Virtual

Program: 1:00 p.m. – 3:30 p.m.

Login Information:

Please click the link below to join the webinar:

<https://us02web.zoom.us/j/82958052721?pwd=bzY5Sy9xcGx2Ui95cjBzdmw3TGlwZz09>

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AGENDA

1:00 p.m. – 1:20 p.m.

EBRI Business Meeting and Consent Agenda

- Stacy Schaus, Schaus Group, EBRI Chair
- Josh Cohen, Prudential, EBRI Vice Chair
- Lori Lucas, CFA, President and CEO, EBRI
- Abigail Bensimhon, Chief Operating Officer, EBRI
- Neil Lloyd, Mercer, EBRI Research Chair

1:20 p.m. – 1:30 p.m.

Lillywhite Award Winner Howard Fluhr of The Segal Group

- Howard Fluhr, Chairman Emeritus, Segal

1:30 p.m. – 2:15 p.m.

COVID-19 as the Driver of Innovation

COVID-19 has become the #1 driver of innovation in the world today. From Heineken's social distancing cooler, to architecture firm NBBJ vision of drive-through medical clinics, to MIT's UV-powered COVID-killing robot, and Surreal Design Studio's sanitizing tunnels and booths, COVID is driving innovation around the world. In this talk, whurley will cover the effects of COVID-19 on innovation and outline opportunities for you to personally innovate. Dan Houston and Ed Murphy will provide their perspectives on how COVID-19 has driven innovation in their businesses.

- whurley, Founder & CEO, Strangeworks
- Dan Houston, Chairman, President and Chief Executive Officer, Principal Financial Group
- Ed Murphy, President, Empower Retirement

2:15 p.m. – 3:00 p.m.

Interactive Sessions (concurrent):

1. SECURE Act 2.0

In this discussion group, Board Members will address the research priorities they hope EBRI will address around SECURE 2.0.

Facilitators:

- Nevin Adams, Chief Content Officer, American Retirement Association
- Liz Varley, Vice President, Ameriprise Financial

2. Global Retirement Trends

In this discussion group, Board members will discuss how EBRI should approach research opportunities in the retirement space of other countries, such as Canada, Australia, U.K., Scandinavia, and New Zealand.

Facilitators:

- David Knox, Senior Partner and Actuary, Mercer
- Lori Lucas, President and CEO, EBRI

3. Financial Investing in Medical Technology

In this discussion group, Board members will discuss how financial investing in medical technology may affect employment-based health benefits. The discussion will start with an emphasis on diagnostic technologies in development that could double or triple the number of cancers that we can detect today with standard-of-care screening methods.

Facilitators:

- Paul Fronstin, Director of the Health Research and Education Program, EBRI
- JD Piro, Principal, Aon

3:00 p.m. – 3:30 p.m.

Virtual Networking

Each Board Member shares insights into how they, their team, or their organization has adapted to COVID-19 in an innovative, and surprisingly productive way.

3:30 p.m.

Adjourn