



EBRI Research Committee Meeting
Tuesday, December 8, 2020
10:30 to 1:30 pm ET

Login Information:

Please click the link below to join the webinar:

<https://us02web.zoom.us/j/82686727796?pwd=bkt4aHA3OVVo5ZHp1NWYreG84WlRQZz09>

Password: 142221

Or iPhone one-tap:

US: +13126266799,,82686727796#,,,,,0#,,142221# or +19292056099,,82686727796#,,,,,0#,,142221#

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Meeting ID: 826 8672 7796

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Find your local number: <https://us02web.zoom.us/j/kb45eEEGu3>

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|----------------------------|--|
| 10:30 am – 10:40 am | Kick-Off – Lori Lucas, EBRI President and CEO; Neil Lloyd, Head US DC & Financial Wellness Research, Mercer; & EBRI Research Chair |
| 10:40 am – 11:00 am | Research Agenda – Mike Skinner, Vice President, T. Rowe Price Group
In this session, the first half 2021 Research Agenda will be covered, including proposed research agenda items from the Research Committee. |
| 11:00 am – 11:20 am | State of EBRI Research – Jack VanDerhei, Research Director, EBRI and Paul Fronstin, Director of the Health Research and Education Program
<i>EBRI lead researchers will provide an update on EBRI databases, research partnerships, and upcoming EBRI research.</i>
Moderator: Neil Lloyd, Head US Defined Contribution & Financial Wellness Research, Mercer, & EBRI Research Chair |
| 11:20 am – 11:45 am | Findings from the Public Retirement Research Lab and RSPM Update
Jack VanDerhei, Research Director, EBRI |
| 11:45 am – 12:00 pm | Break |
| 12:00 pm – 12:30 pm | Research Discussion Groups (<i>Research Committee Members should sign up for a session by 12/1/2020</i>) |

In these discussion groups, EBRI researchers will discuss recent research findings and brainstorming for future research from research committee members. These discussion groups will be co-facilitated by EBRI Chairs and Vice Chairs.

Group 1: Debt: Determining Its Impact on Retirement Preparedness and Financial

Wellness and What Are the Solutions – *Facilitated by: Craig Copeland, Senior Research Associate (Retirement), EBRI and Greg Ward, Director, Financial Finesse Think Tank, Financial Finesse*

Group 2: Telemedicine – *Facilitated by: Paul Fronstin, Director of the Health Research and Education Program, EBRI; Jake Spiegel, Research Associate, EBRI; and Kris Haltmeyer, Vice President, Legislative & Regulatory Policy Blue Cross Blue Shield, Health Program Vice Chair*

Group 3: Elderly Spending Profiles: Findings From HRS/CAMS and EBRI Survey – *Facilitated by: Zahra Ebrahimi, Research Associate, EBRI and Neil Lloyd, Head US Defined Contribution & Financial Wellness Research, Mercer, & EBRI Research Chair*

Group 4: Disparities in Retirement Income Adequacy by Race and Ethnicity: Current Status and the Potential Impact of Various Legislative, Regulatory and Plan Design Modifications – *Facilitated by: Jack VanDerhei, Research Director, EBRI; Lori Lucas, CEO, EBRI; and Brett Hammond, Research Leader, Client Analytics Group, Capital Group*

12:30 pm – 12:35 pm

Rejoin Main Group

12:35 pm – 1:05 pm

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1:05 pm – 1:25 pm

Rejoin Main Group for Readout of Discussion From Groups

1:25 pm – 1:30 pm

Closing Remarks – Lori Lucas, EBRI President and CEO