



**FALL 2018 ASEC Partners' Meeting**  
Wednesday, October 17, 2018, 8:30 am to 1:00 pm  
ACLI

101 Constitution Avenue, NW, Suite 700, Washington, DC, 20001

**AGENDA**

8:30 am – 9:00 am **Continental Breakfast and Networking**

9:00 am – 9:05 am **Welcome and Introduction**

9:05 am – 9:35 am **[Choices and Decisions Affecting Worker Health Status](#)**  
Paul Fronstin, Director of Health Research, EBRI

This presentation will highlight EBRI's latest research on the interactions between financial incentives, health plan choice, workplace wellness program participation, and worker health status.

9:35 am – 10:05 am **[Improving Health and Increasing Wealth: Informing Programs With Research Insights](#)**  
Barbara O'Neill, PhD, CFP®, Extension Specialist in Financial Resource Management, Rutgers University

One of the most crucial intersections in life that influences the way that people live is the nexus between health and personal finances. This session will describe an online survey instrument, the *Personal Health and Finance Quiz*, which enables consumers to self-assess their frequency of performance of 20 recommended health and financial management practices. It will also briefly describe previous studies of relationships between personal behaviors in these two key areas of people's lives.

10:05 am – 10:35 am **[The Convergence of Health & Wealth: Connected problems, connected solutions](#)**  
Matt Bradley, Vice President, HealthEquity Retirement

There is significant evidence that the health and wealth industries are converging. Two of our nation's largest problems, Healthcare Costs and Retirement Readiness, lie at the heart of this convergence. HealthEquity, one of the nation's largest HSA providers and leaders in consumer driven healthcare, will share their thoughts and analysis around why these industries are converging and the powerful opportunity that is emerging for the American family as a result.

10:35 am – 10:50 am Break

10:50 am – 11:20 am **[Caregiving: A Hidden Threat to Retirement Security](#)**

Patti Rowey, Vice President Transamerica Institute

As the US population ages, millions of individuals will be called up on to serve as unpaid family caregivers for an aging parent, spouse, or loved one. Transamerica Institute® conducted a survey of more than 3,000 caregivers to examine the impacts of caregiving responsibilities on caregivers' health, employment status, financial situation, and retirement savings. This presentation will provide an overview of the research findings and specific the risks faced by caregivers.

11:20 am – 11:55 pm **ASEC Partner Updates**

11:55 am – 12:00 pm **Wrap Up**

12:00 pm – 1:00 pm **Networking Luncheon**