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Employee Benefit  
Research Institute

## News from EBRI

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**News from EBRI:**

**The Employee Benefit Research Institute (EBRI) Announces Appointment of  
Lori Lucas as President and CEO**

*2018 marks EBRI's 40th Anniversary and new vision for organization's future*

WASHINGTON, D.C. (February 7, 2018) – The Employee Benefit Research Institute (EBRI), our country’s leading source of data and research on retirement, savings and health programs for workers, is pleased to announce the appointment of Lori Lucas as President and CEO, effective immediately.

Ms. Lucas has 32 years of experience in the investment and benefits industry. Most recently, she worked as an Executive Vice President at Callan, where she was responsible for setting the direction and profitability of Callan's DC business, managing the Defined Contribution Consulting Team, launching and delivering market-leading retirement research, and directly working with plan sponsors and other clients.

In her new role as CEO, Ms. Lucas will be joining the organization at a pivotal time in our country’s economic history, including unprecedented challenges to American workers’ financial security. In announcing this appointment, Stacy Schaus, Chairman of EBRI’s Board of Trustees, stated that, “with her business leadership, extensive research experience and exceptional vision, Ms. Lucas will successfully lead our organization as we address the challenging retirement, healthcare, and other financial security questions facing public and benefits leaders.” Ms. Lucas has been involved with EBRI since 1999 and most recently was the Vice Chair.

“My goal is to continue EBRI’s focus on unbiased data and research that is critical in today’s evolving employee benefits environment,” says Ms. Lucas. “This includes retaining EBRI’s stature as the leading expert and most objective source of research and education in employee benefits, while also providing the data and insights for a fast-changing workplace environment.” Ms. Lucas will be making EBRI’s research more widely accessible and relevant to members, the industry, policy makers, the media and the general public. Included in this mission will be discussions of retirement coverage and redefining employee benefits to include student loans, emergency funds and other benefits that contribute to employees’ overall financial security, as well as expanding membership to include new companies and industries.

Formerly, Ms. Lucas was Director of Retirement Research at Hewitt Associates, Vice President at Ibbotson Associates, a pension fund consultant at J.H. Ellwood & Associates, and an analyst and product head at Morningstar, Inc. She received a Bachelor of Arts degree from Indiana University and a Masters from the University of Illinois and is a CFA® Charterholder. She is the immediate past Chair of the Defined Contribution Institutional Investment Association. She is on the Editorial Advisory Board of Benefits Quarterly and is a former columnist for Workforce Management magazine. She has testified before the Senate HELP Committee,

the DOL, SEC, and ERISA Advisory Council. Her views have frequently been cited in the press, and in articles and white papers she has written. She has also been a featured speaker at national and international conferences on retirement topics.

Ms. Lucas will succeed Harry Conaway, whom EBRI thanks for his service as interim President and CEO.

**About EBRI.** Founded in 1978, EBRI was established as an independent, nonprofit, nonpartisan organization. Its mission is to be a research and data organization providing the highest quality of information on retirement, savings and health programs for workers and employers, without lobbying or advocacy involvement. The organization conducts research and reports its findings without spin or an underlying agenda. All findings are revealing and reliable—the reason EBRI information is the gold standard. EBRI’s members include employers, unions, insurers, financial service providers, benefit consultants, providers of health care services, consumer groups, and others. Reports and books are published online and members have access to more detailed insights, tabulations, comparisons and researchers. To learn more, visit: [www.EBRI.org](http://www.EBRI.org).

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