2018
Employee Financial Well-Being
CONFERENCE

Differentiating Approaches Across Generations, Income Levels and Business Models

November 29–30, 2018
W Chicago-Lakeshore
Chicago, IL

www.conferenceboard.org/financialwell-being
Agenda – updated 11/21/18

Speakers to date:

Tracy Allie, Human Resources Manager, Allstate Insurance
Dawn Armenio, North America Pension and Benefits Design and Global Business Development Lead, IBM
Maria Artime, SVP Total Rewards, HBO
Anne Bodnar, Chief Human Resources Officer, Willis Towers Watson
Amanda Carney, Co-Founder and President, Working Credit NFP
Jamie Erickson, Vice President, Wealth Strategies, United Health Group
Ellen Frank-Miller, Senior Research Fellow & Adjunct Professor, Social Policy Institute at Washington University in St. Louis
Julie Gebauer, Human Capital and Benefits Leader, Willis Towers Watson
Melissa Gopnik, SVP, Commonwealth
Leigh Gross, VP of Business Development, CommonBond
Bill Gulliver, North American Retirement Leader, Willis Towers Watson
Jason Herman, Executive Director, Morgan Stanley Wealth Management
Amy Johnson, SVP HR, Salt River Project
Karolyn G. Karl, Talent Consultant, Willis Towers Watson
Beata Kashani, Senior Director, Global Head of Talent and Rewards, Morton Salt
Sarah Krause, Global Retirement & Financial Well Being Strategy & Compliance Leader, Boeing
Kent Lingerfelt, SVP Compensation & Benefits, Equifax Inc.
Mary Moreland, Divisional Vice President, Compensation and Benefits, Abbott Labs
Erik Nilsen, Executive Director, Baseball Assistance Team (B.A.T.) - Major League Baseball
Michelle Mills, Americas Compensation & Benefits, InterContinental Hotels Group
Jason Podvin, Director Global Benefits, Eastman Chemical Company
Dan Scheinkman, Vice President, Compensation & Benefits, Freddie Mac
Purnima Shah, Corporate Benefits Strategy Manager, Michelin North America
Mark Smreczek, Senior Consultant, Willis Towers Watson
Robin Wood, Director, Retirement Benefits, Ford Motor Company

Day One,
Thursday, November 29, 2018
(Times subject to change)

Registration and Continental Breakfast: 8:00 – 8:45 am

8:45 – 8:50 am
Welcome and Opening
Lisa Hunter, Program Director, The Conference Board

8:50 - 9:50 am
Financial Well-Being: Starting Points and the End Goal
Taking the first step to launch, grow or change your financial wellbeing offerings is an action that follows vigilant consideration of workplace needs and goals. This session will offer the latest on global employee attitudes regarding financial wellbeing and the link between wellbeing, productivity and what employees value from employer-sponsored programs.

We will hear how United Health Group used financial stress research in a workforce diagnostic that helped serve as their roadmap for action – from building the business case to monitoring progress.

Julie Gebauer, Human Capital and Benefits Leader, Willis Towers Watson
Jamie Erickson, Vice President, Wealth Strategies, United Health Group

9:50 - 10:45 am
Financial Health and the Impact on Employee Wellbeing, Engagement, and Productivity
This discussion will explore how financial wellbeing connects with overall wellbeing and how an organization’s philosophy on financial wellbeing can be critical to improving outcomes and supporting the whole employee. We will hear how Boeing and Ford are expanding their view to be inclusive of a holistic and global wellbeing model. And, we’ll hear how they used messaging and a cohesive approach across various partners to reach diverse employee populations.

Moderator: Karolyn G. Karl, Talent Consultant, Willis Towers Watson
Sarah Krause, Global Retirement & Financial Well Being Strategy & Compliance Leader, Boeing
Robin Wood, Director, Retirement Benefits, Ford Motor Company

10:45 – 11:00 am: Networking Break

11:00 am - 12:15 pm
Financial Well-Being: Across Generations, Income Levels and Business Models
Speakers will address complementary topics to demonstrate the range of needs and programs:

- Amanda Carney, Co-Founder and President, Working Credit NFP
- Credit building as a uniquely effective lever to improve employee financial health. Our speaker will discuss how focusing on credit score health and literacy for all employees has created the foundation of financial wellness across age groups and income levels.

For sponsorship opportunities, please contact michael.felden@conferenceboard.org
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 – 8:15 am</td>
<td>Registration and Continental Breakfast</td>
</tr>
<tr>
<td>8:15 – 8:50 am</td>
<td>Opening – Day 2</td>
</tr>
<tr>
<td>8:50 – 9:45 am</td>
<td>Pioneering New Programs to Change the Math of Savings</td>
</tr>
<tr>
<td>9:45 am – 10:15 am</td>
<td>Lunch – Topic Tables (Consult separate list to select your table)</td>
</tr>
<tr>
<td>10:15 am – 10:30 am</td>
<td>Networking Break</td>
</tr>
<tr>
<td>10:30 am – 11:30 am</td>
<td>Fueling Improved Retirement Readiness within Financial Wellbeing Strategy</td>
</tr>
<tr>
<td>11:30 am – 12:15 pm</td>
<td>Data Driven Approach to Evaluating and Implementing Student Loan Debt Programs</td>
</tr>
<tr>
<td>12:15 pm – 1:15 pm</td>
<td>Lunch – Topic Tables (Consult separate list to select your table)</td>
</tr>
<tr>
<td>1:15 pm – 2:15 pm</td>
<td>Working with Partners to Meet the Changing Financial Well-Being Challenges</td>
</tr>
<tr>
<td>2:15 pm – 3:15 pm</td>
<td>Pioneering New Programs to Change the Math of Savings</td>
</tr>
<tr>
<td>3:15 pm – 3:40 pm</td>
<td>Networking Break</td>
</tr>
<tr>
<td>3:40 pm – 4:50 pm</td>
<td>Working with Partners to Meet the Changing Financial Well-Being Challenges</td>
</tr>
<tr>
<td>4:50 pm – 5:00 pm</td>
<td>Closing Remarks and End of Day One</td>
</tr>
<tr>
<td>5:00 pm – 6:00 pm</td>
<td>Networking Reception</td>
</tr>
</tbody>
</table>

**Day Two, Friday, November 30, 2018**
(Times subject to change)

- **Registration and Continental Breakfast:** 8:00 – 8:45 am
- **Opening – Day 2:** Lisa Hunter, Program Director, The Conference Board
- **Pioneering New Programs to Change the Math of Savings:** Historic levels of student debt have forced many people to choose between saving for their futures and paying off school loans. Employers are also seeing the pressure of debt management lead manifest at the workplace. This discussion will offer insight on what issues Willis Towers Watson is seeing most often on this topic and the type of actions employers are taking.

**Pioneering New Programs to Change the Math of Savings**

In addition, we’ll hear directly from Abbott on their groundbreaking program, Freedom 2 Save, which was covered in a recent IRS private letter ruling and is changing the math of retirement savings for much of their workforce.

**Bill Gulliver,** North American Retirement Leader, Willis Towers Watson

**www.conferenceboard.org/financialwell-being**
Mary Moreland, Divisional Vice President, Compensation and Benefits, Abbott Labs

9:45 – 10:15 am
**Critical Pivots: Pushing Forward on Financial Wellbeing While Navigating Change**
The effect of poor financial wellbeing in the workplace is tangible so pushing for program evolution is critical, even in times of change. This discussion will profile how Willis Towers Watson evaluated financial wellbeing in light of growing businesses and workforces due to their most recent merger. We will hear how the role of technology in defined benefit choice and in their financial wellbeing program overall has evolved over time. And, we will learn what approaches to analytics have been most valuable.

Anne Bodnar, Chief Human Resources Officer, Willis Towers Watson

10:15 - 10:30 am: Networking Break

10:30 - 11:30am
**One Size Rarely Fits All: Highlights of Special Programs**
This session will feature a discussion of how insight from employee resource groups and employee feedback helped these organizations identify needs within their employee populations and the creative approaches they have taken to improve employee financial well-being.

Maria Artime, SVP Total Rewards, HBO
Erik Nilsen, Executive Director, Baseball Assistance Team (B.A.T.) - Major League Baseball
Jason Podvin, Director, Global Benefits, Eastman Chemical Company

11:30 am - 12:15 pm
**Developing the Road Map to Change Behavior**
Providing industry leading benefits has always been marketplace differentiator for Freddie Mac. However, a one-size fits all strategy did not provide the range of financial wellness offerings to help employees during specific career stages and life events. With a renewed focus on enabling its employees to live their best life, Freddie Mac has developed a strategy to address the specific segments of their workforce and will share an example of how they are putting this in action through a unique approach to the student loan debt repayment program.

Dan Scheinkman, Vice President, Compensation & Benefits, Freddie Mac

12:15 - 12:30 pm
**Closing Remarks**
REGISTRATION INFORMATION

Online  www.conferenceboard.org/financialwell-being
Email  customer.service@conferenceboard.org
Phone  212.339.0345
       8:30 am – 5:30 pm ET, Monday – Friday

<table>
<thead>
<tr>
<th>Pricing:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>$1,995</td>
</tr>
<tr>
<td>Non–Members</td>
<td>$2,195</td>
</tr>
</tbody>
</table>

Fees do not include hotel accommodations.

Location and Hotel Accommodations
W Chicago Lakeshore
644 Lakeshore Dr.
Chicago, IL 60611
Tel: 312-943-9200

Hotel cut-off date: **November 7, 2018**

Cancellation Policy
Full refund until three weeks before the meeting. $500 administration fee up to two weeks before the meeting. No refund after two weeks before the meeting. Confirmed registrants who fail to attend and do not cancel prior to the meeting will be charged the entire registration fee.

Team Discounts per Person
For a team of three or more registering from the same company at the same time, take $300 off each person’s registration. One discount per registration. Multiple discounts may not be combined.