Employee Financial Well-Being
CONFERENCE

Shifting and Deploying Resources: Building a Stronger Future

VIRTUAL EVENT
December 08 – 09, 2020

www.conferenceboard.org/employeefinancialwellness
DAY ONE
Tuesday, December 8, 2020

12:00 - 12:15 pm  General Session A
Welcome & Opening Remarks
Lisa Hunter, Program Director and Senior Fellow, The Conference Board

12:15 – 1:00 pm  General Session B
Employee Financial Well-being in a Post-COVID World
The global pandemic, the resulting economic crisis, and the recent social unrest have upended “business as usual” for employers. These events have highlighted the many challenges that Americans face and renewed employers’ commitment to supporting their people through financial wellness benefits that address the needs of their diverse workforces.

This panel will explore how employers have addressed the financial wellness challenges of their employees during the pandemic and the lessons learned that will shape the future of financial wellness offerings.

Krystal Barker, Head of Financial Wellness, Morgan Stanley at Work
Kate Winget, Head of Gradifi, Morgan Stanley at Work
Beth Brockland, Senior Director, Financial Health Network

1:00 – 1:10 pm
Wellness Break – Take Time to Breathe & Reflect

1:10 – 1:50 pm  General Session C
Financial Well-Being: A Key Element in IBM’s HR Strategy
At IBM one of Human Resource’s strategic priorities is creating an environment and offerings that remove roadblocks for employees to succeed. They are firmly committed to an integrated approach that recognizes a broad range of issues and needs on many levels; understanding and addressing employee financial well-being is a key component of that strategy.

Our speakers will discuss how they identify and mitigate stressors to allow employees to bring their best self to work. They will address how they work with employee groups to optimize offerings and how they shifted resources and priorities to address COVID-19.

Jaqueline Oliveira-Cella, Director, GPO, Global Pensions and Ancillary Benefits Design and Strategy, IBM

1:50 – 2:00 pm  Virtual Break

2:00 – 2:40 pm  General Session D
Getting the Workforce Back to “Healthy” Financial Footing
Financial stress is at an all-time high as employees have been presented with many unexpected challenges.

This session will address:
- How providing personalized and integrated solutions can improve results and engagement
- How Accolade is helping their employees deal with the curveballs and challenges thrown at them this year
- The need for “complete employee financial care” to improve financial health & engagement and increase productivity for the organization – a Win-Win…

Tom Spann, CEO & Co-founder, Brightside
Britt Provost, EVP People & Culture, Accolade

2:40 – 2:50 pm
Wellness Break – Take Time to Breathe & Reflect

2:50 – 3:35 pm  General Session E
Communicating about Financial Wellness Benefits: Then and Now…

Employers are challenged with providing more information on what resources are offered and how to tap into them. With more employees experiencing financial stress, communicating clearly and quickly about complex issues requires changes to approach, new delivery channels, increased speed, and flexibility. In this session, we will explore the role of financial wellness and communication to improve understanding and drive employee engagement.

3:35 – 3:45 pm  General Session F
Day 1 – Wrap-Up & Closing Remarks
Lisa Hunter, Program Director, The Conference Board

For sponsorship opportunities, please contact michael.felden@conferenceboard.org
In this session you will hear about the role of Mastercard’s employee financial programs and resources in attracting and retaining talent and improving engagement while at the same time helping employees build a solid financial future for themselves and their families.

Christina Brenner, SVP Total Rewards, MasterCard
Sarah Gretczko, SVP Chief Learning & Insights Officer, MasterCard

2:25 – 2:30 pm
Wellness Break – Take Time to Breathe & Reflect

2:30 – 3:10 pm General Session K
Wellness Benefits That Matter Most in the Time of COVID-19
In today’s market environment companies and HR leaders are focused on making strategic decisions related to the wellness benefits that matter most to their employees. During this session BrightPlan will share data from a recent survey that highlights what employees care about most now and the perspective of HR and benefits leaders. You will hear what's top of mind for industry leaders, including how they're gaining a pulse on what employees care about and prioritizing the right benefits to enable their employees' total well-being.

BrightPlan will share highlights from a report published by IDC, The Business Impact of Employee Financial Wellness, and why financial wellness needs to be a strategic priority for companies. With personal finances at the forefront of your employees’ minds, financial wellness benefits are becoming a must-have for attracting and retaining top talent!

Neha Mirchandani, CMO, BrightPlan

3:10 – 3:40 pm General Session L
Roundtable Discussion with Experts: Financial Well-Being Leveraging Resources for the Future
Panel of speakers will discuss themes and issues and provide for additional attendee Q&A

Michael Ballard, Head of Product Strategy Morgan Stanley Financial Wellness, Morgan Stanley at Work
Moderator:
Lisa Hunter, Program Director, The Conference Board

3:40 – 3:45 pm General Session M
Day 2 – Wrap-Up & Closing Remarks
Lisa Hunter, Program Director, The Conference Board
REGISTRATION INFORMATION

Online  www.conference-board.org/employeefinancialwellness
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>COMPLIMENTARY</td>
</tr>
<tr>
<td>Non-Members</td>
<td>$495</td>
</tr>
</tbody>
</table>

©2020 The Conference Board, Inc. All rights reserved.
Program subject to change. October 2020