



Employee Financial Well-Being CONFERENCE

Shifting and Deploying Resources:
Building a Stronger Future

VIRTUAL EVENT
December 08 – 09, 2020

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DAY ONE

Tuesday, December 8, 2020

12:00 - 12:15 pm

Welcome & Opening Remarks

Lisa Hunter, Program Director and Senior Fellow, **The Conference Board**

12:15 – 1:00 pm **General Session A**

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 Buissereth CFA, 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 **Virtual Break – Reflect & Recharge**

1:10 – 1:55 pm **General Session B**

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 share cases studies that address optimizing selected offerings, the interlock between savings and diversity and inclusion, as well as mental well-being; 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**

Sayi Ligonah, Leader, North American Benefits Design and Strategy, **IBM**

Alessandra Caparros, Leader, Latin America Benefits Design and Strategy, **IBM**

1:55 – 2:05 pm **Virtual Break – Reflect & Recharge**

2:05 – 2:45 pm **General Session C**

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**

2:45 – 2:55 pm **Virtual Break – Reflect & Recharge**

2:55 – 3:40 pm **General Session D**

Elevating Your Financial Wellness Impact Through Data-Driven Communications

You work hard to build compelling financial wellness programs. But what if you're not getting the traction you expected? In this session, you'll learn how to utilize hyper-personalized analytics and the latest strategies for effectively engaging employees in their financial well-being, using insights from behavioral psychology and marketing. Additionally, the software company, Synopsys, will share their award-winning approach to engaging employees of all ages in their personal finances.

Jonathan Price, SVP National Retirement Practice Leader, **Segal Group**

Megan Yost, VP, Engagement Strategist, **Segal Benz**

Kerstin Aiello, Director of North America Benefits, **Synopsys Inc.**

3:40 pm

Day 1 – Wrap-Up & Closing Remarks

Lisa Hunter, Program Director and Senior Fellow, **The Conference Board**

DAY TWO

Wednesday, December 9, 2020

12:00 - 12:10 pm

Day 2 – Welcome, & Opening Remarks

Lisa Hunter, Program Director and Senior Fellow, **The Conference Board**

12:10 – 12:35 pm

General Session E

Financial Well-Being is a C-Suite Issue: What do your leaders know about workers' financial well-being?

Even before the COVID-19 crisis hit financial stress and worker

financial wellness were critical issues requiring creative solutions. In this session JUST Capital will detail a newly launched initiative that is meant to change the narrative about the role of the C-Suite in understanding workers' financial security and the tools needed to do the assessment. This initiative was created in partnership with PayPal, and in collaboration with the Financial Health Network and the Good Jobs Institute. The organizations are also building on existing research around the business and investor case for understanding this business dimension and addressing challenges around it.

Alison Omen, Chief Strategy Officer, **JUST Capital**

12:35 – 1:10 pm **General Session F**

Reducing Employees' Financial Stress: Strategies that Work in the Real World

Employees should not have to deal with financial stress alone, especially in these trying times; and they don't have to. While there is no magic bullet research confirms that many effective strategies for reducing employee financial stress come with few, if any, hard costs to employers. Learn what successful employers have done to achieve better business results and have healthier, happier workers by reducing employees' financial stress.

Our speakers will provide insight on a variety of proven strategies to reduce employee financial stress and will share specific examples of what works based on research and employer case studies.

Kelly Aiken, Chief Program Officer, **National Fund for Workforce Solutions**

Ellen Frank-Miller, Senior Scientist and Adjunct Professor, **Washington University in St. Louis**

1:10 – 1:20 pm **Virtual Break – Reflect & Recharge**

1:20 – 2:00 pm **General Session G**

Why's and How's of Combating Employee Financial Stress During the Pandemic and Beyond

In a recent NPR poll, almost half of US households reported facing serious financial problems during the pandemic, and a 2020 survey by the American Psychological Association found that 64% of US adults identified money as a significant source of stress. Employee financial stress contributes to loss of productivity and higher healthcare claims and turnover.

You can make a difference. 79% of employees want to work for an employer who cares about their financial wellness. The challenge is that financial stressors vary greatly across different age groups, career stages, and industries so it can be difficult to determine the best benefits to offer. In this session, speakers will share data and expertise on:

- Current statistics around employee financial stress based on industry and employee demographics
- Case studies from employers with successful financial wellness programs
- How workforce data can help you identify gaps in your current benefits offerings

Zoey Cole, Analytics Product Director, **Equifax Employee Benefits Services**

Lucy English, PhD. Head of Measurement, **Brightside**

2:00– 2:35 pm

General Session H

Mastercard's Four Pillars of Well-Being: Employee Financial Well-Being is Key

One of the key enablers of Mastercard's strategy is people. In our speaker's words: "We believe that what we do, is as important as who we are and that decency drives our culture, a winning culture with decency at the core. Part of our commitment to our employees is support in four key areas of well-being: mind, body, social and financial."

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**

Steve Boucher, Vice President, Learning Strategy & Innovation, **Mastercard**

2:35 – 2:40 pm **Virtual Break – Reflect & Recharge**

2:40– 3:20 pm

General Session I

The Employee Experience & Financial Wellness Connection

In today's primarily remote work environment, employee engagement is more important than ever before. As HR leaders rethink how to engage their employees, what programs can have the most positive impact on your employees and your company?

This session will highlight why you need to prioritize employee engagement now, the key components of an employee engagement program, and the role well-being, specifically financial wellness, should play when it comes to addressing employee "careabouts". Our speaker will highlight perspectives shared by HR leaders from Autodesk and eBay, you will hear why they're prioritizing financial wellness, how to measure the success of financial wellness programs, and how leading employers remain committed to investing in their employees' well-being. The session will also include insight from a new IDC Market Spotlight report, The Business Impact of Employee Financial Wellness, and reinforce why financial wellness needs to be a strategic priority for companies.

Neha Mirchandani, CMO, **BrightPlan**

3:20– 3:55 pm

General Session J

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

Andrew Lendnal, Executive Director, Head of Financial Wellness Corporate Engagement & Global Strategy, **Morgan Stanley at Work**

Rosaria Sasso, (former) SVP, Global Total Rewards Strategy,

ViacomCBS

Moderator:

Lisa Hunter, Program Director, The Conference Board

3:55 pm

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

Pricing:	
Members	COMPLIMENTARY
Non-Members	\$495