

EBRI-ERF POLICY FORUM #85 RETIREMENT, HEALTH, AND FINANCIAL WELLBEING

MAY 9, 2019

WELCOME



Lori Lucas

President and CEO, EBRI



Michael Doshier

Vice Chair, EBRI Public Policy Advisory Council

Head of Retirement, Global Marketing Services, Franklin Templeton

Wi-Fi Network: DCCTR
Password: meeting2015DC

 #EBRIPolicyForum

AGENDA

- 8:30 Welcome
- 8:45 Under the Dome – A Closer Look at Legislative Proposals Impacting Retirement
- 9:45 The Latest Research and Perspectives on Managing the Cost of Employment-Based Health Benefits
- 10:45 Networking Break
- 11:15 Navigating the Financial Wellness Landscape
- 12:45 Networking Lunch
- 1:15 Keynote: A Benefits Industry Ripe for Change: Insights from 7 Petabytes of Data
- 1:50 Wrap Up
- 2:00 Adjourn

THANK YOU POLICY FORUM DEVELOPMENT TASK FORCE!

Michael Doshier, Franklin Templeton

Tom Johnson, Retirement Clearinghouse

Liz Varley, Ameriprise Financial, Inc.

Sarah Holden, Investment Company Institute

Josh Freely, TIAA

Bob Holcomb, Empower Retirement

Kris Haltmeyer, Blue Cross Blue Shield Association

David Guilmette, CIGNA

Stacy Scapino, Mercer

Aron Szapiro, Morningstar, Inc.

Karl Paulson, Public Employees' Retirement Association of Colorado

Melissa Kahn, State Street Global Advisors

Bob Doyle, Prudential Financial

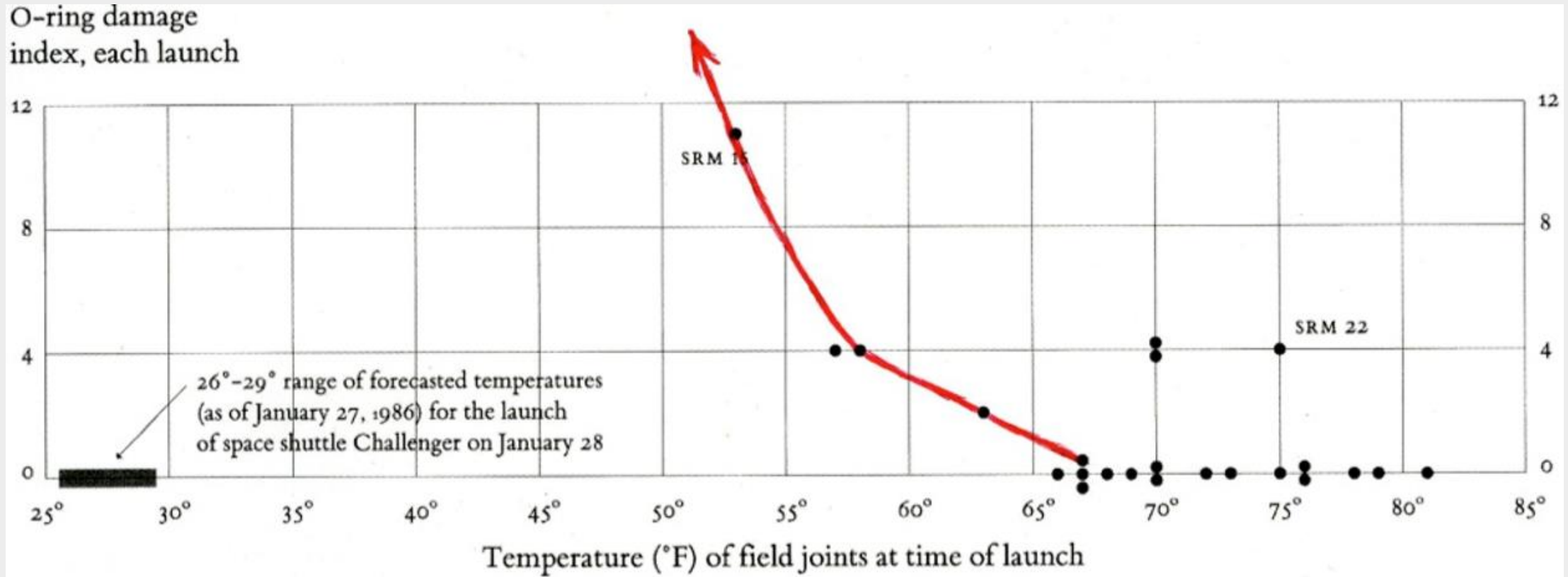
THE IMPORTANCE OF DATA—AND SOUND ANALYSIS

In *The Visual Display of Quantitative Information*, Edward Tufte posits that better representation of the relationship between O-ring damage and temperature could have saved the Space Shuttle Challenger.

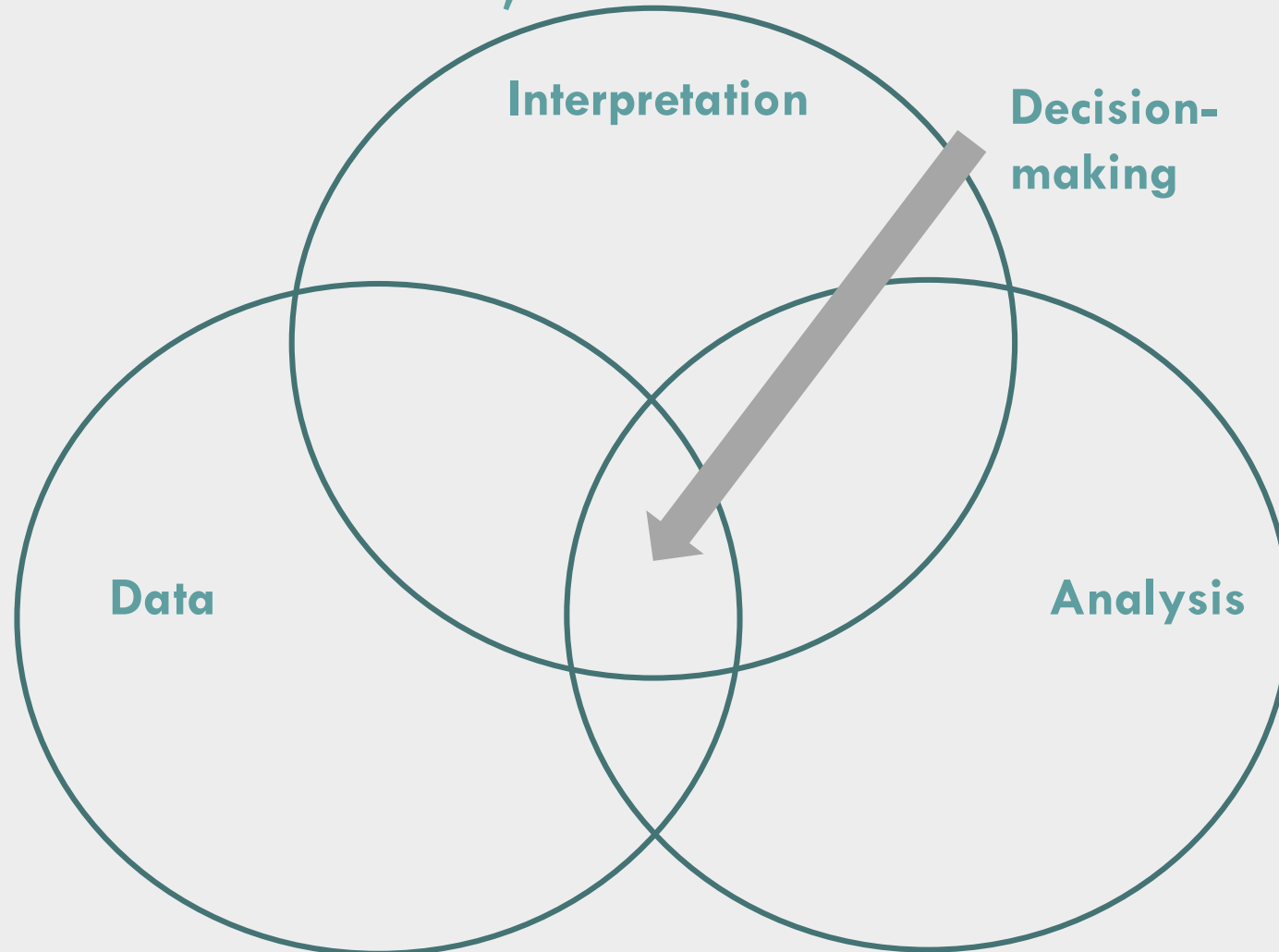
HERE'S WHAT NASA ENGINEERS SAW

	Temperature	Erosion	Blowby	Total	Damage
1	53	3	2	5	11
2	57	1	0	1	4
3	58	1	0	1	4
4	63	1	0	1	2
5	66	0	0	0	0
6	67	0	0	0	0
7	67	0	0	0	0
8	68	0	0	0	0
9	69	0	0	0	0
10	70	0	0	0	0
11	70	1	0	1	4
12	70	0	0	0	0
13	70	1	0	0	4
14	72	0	0	0	0
15	73	0	0	0	0
16	75	0	0	0	0
17	75	0	0	1	0
18	76	0	2	0	4
19	76	0	0	0	0
20	78	0	0	0	0
21	79	0	0	0	0
22	81	0	0	0	0

THIS IS WHAT THEY DIDN'T SEE



THE NEXUS OF DATA, ANALYSIS, INTERPRETATION, AND DECISION-MAKING



TODAY'S AGENDA

- Under the Dome – A Closer Look at Legislative Proposals Impacting Retirement
- The Latest Research and Perspectives on Managing the Cost of Employment-Based Health Benefits
- Navigating the Financial Wellness Landscape
- A Benefits Industry Ripe for Change: Insights from 7 Petabytes of Data