



Benefits Briefing:

Six Steps to Building an Effective Financial Wellness Program

Thursday, October 29, 2:00-3:00 p.m. ET

BENEFITS BRIEFING WEBINAR: Six Steps to Building an Effective Financial Wellness Program

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The American Benefits Council will host a **Benefits Briefing webinar** on **Thursday, October 29, at 2:00 p.m. Eastern Time** to discuss how leading companies are addressing financial wellness in their organizations.

Lynn Dudley, *senior vice president, global retirement and compensation policy*, will moderate the discussion. She will be joined by:

- **Megan Yost**, *Vice President, Head of Participant Engagement, Defined Contribution, State Street Global Advisors*
- **Jen Benz**, *CEO, Benz Communications*
- **Jamie Erickson**, *Executive Director, Retirement Benefit Plans, Comcast-NBC Universal*
- **Barbara Kontje**, *Director, Retirement Americas & Smart Saving, American Express Company*

The presenters will outline best-practice tips for bringing financial wellness to the workplace, including how to:

1. Understand the five employee segments that characterize key phases of financial wellness.
2. Overcome four common obstacles in implementing a financial wellness program.
3. Consider the six must-ask questions before building a business strategy and vision around financial wellness.

We will take questions from webinar participants throughout the session and attempt to answer as many as possible. Members are encouraged to [submit questions for the webinar in advance](#).

A recording of this session will be sent to all registrants. Even if you will not be able to attend in person, please register to receive a digital playback of the webinar automatically.

NOTE: Participation in Council webinars may be used toward continuing education/renewal requirements for many professional accreditation programs, but only by means of self-certification. Descriptions of past programs are available by [clicking here](#). Please retain your registration confirmation for your verification records.

For questions related to registration – If you have colleagues at your organization who would like to participate in this session, but do not regularly receive Council materials, please contact [Deanna Johnson](#), director, membership, or [Sondra Williams](#), manager, member and staff engagement, at (202) 289-6700.



The American Benefits Council is the national trade association for companies concerned about federal legislation and regulations affecting all aspects of the employee benefits system. The Council's members represent the entire spectrum of the private employee benefits community and either sponsor directly or administer retirement and health plans covering more than 100 million Americans.

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