NC STATE UNIVERSITY COLLEGE OF MANAGEMENT

Pre-Retirement Planning in the Workforce
October 16, 2009
Raleigh Marriott City Center
Raleigh, N.C.

Agenda

Tentative as of June 23, 2009

9:00 AM **Registration and Coffee with Networking Opportunities**

10:00 AM **Welcome: Defining the Issues**

Robert Clark, Professor
Department of Economics and Department of Management, Innovation, and Entrepreneurship
North Carolina State University College of Management

Elaine F. Marshall, Secretary of State
North Carolina

10:15 AM Session One: Assessing the Need for Financial Education in the Workplace

Business Case for Employer-Provided Retirement Planning Programs
Sally Hass, Benefits Education Manager
Weyerhaeuser (retired)

Financial Education in the Work Place: National Trends
William Arnone, Employee Financial Services
Ernst & Young (retired)

11:00 AM Session Two: Financial Education in the Workplace: Developing, Presenting, and Evaluating: What are the Best Practices?

Moderator:
Frank Buckless, KPMG Professor and Head
Department of Accounting
North Carolina State University College of Management

Mary Mullooly, Benefits Manager
BD

Beth Pattillo, Senior Human Resources Specialist
Progress Energy Service Company

R. Lynn Pettis, Partner and National Director,
Employee Financial Services Practice
Ernst & Young

12:00 PM Lunch and Discussion

Retirement Plans, Financial Literacy, and Education

John Haley, Chief Executive Officer
Watson Wyatt Worldwide

Continued ...

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Afternoon Agenda

1:00 PM	Importance of Financial Education for Older Workers and the Role of NC Department of State Treasurer Janet Cowell, Treasurer State of North Carolina
1:15 PM	Session Three: Financial Literacy and Worker Knowledge of Retirement Programs: A Challenge for Employers and Employees Martin Sallee, Financial Benefits Manager - Total Rewards State Farm Olivia Mitchell, International Foundation of Employee Benefit Plans Professor of Insurance and Risk Management The Wharton School, University of Pennsylvania Jason Fichtner, Acting Deputy Commissioner U. S. Social Security Administration
2:15 PM	Break and Interaction Among Participants
2:30 PM	Session Four: Assessing Worker Preferences for Financial Education Programs: How Can an Employer Know that Employees Value and Want These Programs? Moderator: Melinda Morrill, Assistant Professor, Department of Economics North Carolina State University College of Management Nancy Van Maren, Retirement Education Consultant The Williams Companies Jeanene Martin, Senior Vice President Human Resources WakeMed Annamaria Lusardi, Professor Department of Economics Dartmouth College
3:30 PM	Session Six: Evaluating Employer Programs: Action Plans and Takeaways General Discussion Moderated by: Robert Clark, Professor Department of Economics and Department of Management, Innovation, and Entrepreneurship North Carolina State University College of Management
4:00 PM	Refreshments and Networking Opportunities
5:00 PM	Conclusion