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 ...
Pre-Retirement Planning in the Workforce
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