



Summer 2017 ASEC Partners' Meeting
Wednesday, July 19, 2017, 8:30 am to 1:00 pm
Financial Services Roundtable
600 13th Street, NW, Suite 400 Washington, DC, 20005

AGENDA

8:30 am - 9:00 am **Continental Breakfast and Networking**

9:00 am - 9:05 am **Introduction and Welcome**
Carolyn Pemberton, ASEC Program Coordinator

9:05 am – 9:50 am **Developments in Research and Evaluation of Financial Education**
Ted Beck, President and CEO, National Endowment for Financial Education (NEFE)

One of the positive recent developments in the financial capability world is a surge in high quality and usable research. Ted will cover current developments in NEFE funded research including reports on cognitive decline, the financial position of young adults and financial decision making in Latino households. He will also report on the growing interest in work place education and review new NEFE resources. In addition, Ted will update us on NEFE's work in program evaluation and identifying key success factors.

9:50 am – 10:35 am **Enhancing Workers' Savings Behavior with Sidecar Saving Accounts**
David John, Senior Strategic Advisor, AARP Public Policy Institute

Auto enrollment is very effective at increasing participation in retirement savings account. This mechanism would be even more useful, especially for younger workers and those with low-to-moderate incomes if these plans also allowed employees to save for unexpected expenses. In this presentation David will explain how Sidecar Savings Accounts work and the benefits they offer workers and employers.

10:35 am – 10:50 am **Break**

10:50 am – 11:35 am **Irresistible Force: The HSA in Your Future**
Jack Towarnicky, Executive Director, Plan Sponsor Council of America

In this presentation Jack will review Health Savings Accounts (HSA) growth, show projections for future growth and demonstrate why the HSA

is a superior design for today and tomorrow. He will also discuss how employers are increasingly deploying HSA-qualifying high deductible health plan (HDHP) options using auto-enrollment and how they are incorporating savings and deferred claiming concepts to maximize tax deferred earnings and to re-frame annual enrollment in welfare benefits to include a long term perspective.

11:35 am – 12:00 pm **Partner Updates**

12:00 pm – 1:00 pm **Close and Networking Lunch**