



Regional Employee Benefits Forum & Cocktail Reception
Charlotte, NC - September 21, 2018
Agenda

7:30 AM - 8:20 AM - **Registration and Continental Breakfast**

8:20 AM - 8:30 AM - **Opening Remarks**

8:30 AM - 9:20 AM - **Session 1: Legislative/Compliance and Regulatory Update**

Speakers:

Sam Henson, Director of Legislative & Regulatory Affairs, Lockton Retirement Services

Mark Holloway, Director of Compliance Services, Lockton Benefit Group

9:30 AM – 10:20 AM - **Session 2: Trends in Healthcare and Pharmacy Cost Management**

Speakers:

Nathan Gabhart, Chief Executive Officer, TrueScripts Management Services

Scott Mayer, Director of Data Analytics at AssuredPartners

10:20 AM – 10:35 AM - Refreshment Break

10:35 AM – 11:25 AM - **Session 3: HSA's: Evolving from "Spending" to "Savings"**

Speakers: Stephen Long, Retirement Director, Fidelity Investments

Kevin J. Keogh Jr., Regional Sales Director, Empower Retirement

TJ Hannig, Sr. Account Manager, Lockton

11:25 AM – 12:50 PM - **Lunch Keynote: "The Future of Work: Insights from the MIT AgeLab"**

Speaker: Ryan Sullivan, Managing Director, Strategic Markets, Hartford Funds

1:00 PM – 1:50 PM- **Session 4: What's Your Definition of Financial Wellness?**

Speakers: Todd Timmerman, Managing Director, Retirement Plan Analytics

Wayne Greenough, Sr. Consultant, Retirement Plan Analytics

2:00 PM - 2:50 PM- **Session 5: Technology that Works for Benefits Communication**

Speaker: Bridget Lind, Director, Product Marketing, Businessolver

3:00 PM – 3:50 PM – **Session 6: CyberSecurity and SOC 1 & 2 Control Issues**

Speakers: Jay Brietz, Shareholder, SOC Reporting Practice Leader, Elliott Davis

Mark Strosahl, Senior Information Security Analyst, Principal Financial Group

4:00 PM – **Closing Comments and Adjournment**