



**SPRING 2018 ASEC Partners' Meeting**  
Wednesday, April 18, 2018, 8:30 am to 1:00 pm  
Arnold & Porter, LLP  
601 Massachusetts Avenue, NW, Room 3137, Washington, DC, 20001

## **AGENDA**

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

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

9:05 am – 9:15 am     **EBRI Update**  
Lori Lucas, EBRI President and CEO

9:15 am – 10:00 am   **[Five Principles of Effective Financial Education](#)**  
Irene Skricki, Consumer Financial Protection Bureau (CFPB)

In this presentation Irene will share how the CFPB developed the Five Principles of Effective Financial Education and what the key concepts are under each principle. You will also learn about programs that have incorporated the principles and have been shown to be effective as well as practitioner tips for how to put these principles into practice.

10:00 am – 10:45 am   **[Addressing the Link Between Financial Literacy and Financial Behavior](#)**  
Andrea Hasler, Global Financial Literacy Excellence Center.

This presentation will address financial literacy levels in the U.S. and the link to financial behavior and decision-making such as retirement planning and investing, debt management, and wealth accumulation. Andrea will also talk about the structure, impact and effectiveness of workplace financial wellness programs as initiatives to raise financial literacy levels.

10:45 am – 10:55 am   Break

10:55 am – 11:40 am   **Panel Discussion: What Can We Learn from Public Opinion Surveys**  
**Panelists:** [Craig Copeland](#), Senior Research Associate, EBRI;  
[Sarah Holden](#), Senior Director, Retirement and Investor Research, ICI;  
[Andrew Melnyk](#), Vice President of Research and Chief Economist, ACLI  
**Moderator:** Mathew Greenwald, President & CEO, Greenwald & Associates

In this discussion the panelists will present highlights from their respective surveys and reports and will share insights on the attitudes and behavior of pre-retirees that can be gleaned from this body of work. Following the presentations we will have a question and answer session with the attendees.

11:40 am – 12:00 pm **ASEC Partner Updates**

12:00 pm – 1:00 pm **Networking Luncheon**