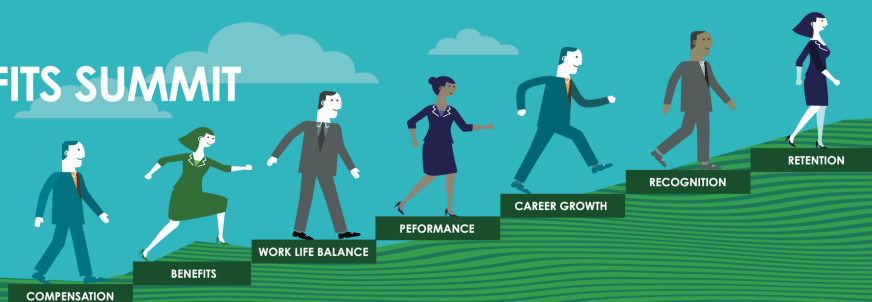


2023 EMPLOYEE BENEFITS SUMMIT

Friday, May 12, 2023
Franklin Marriott Cool Springs



AGENDA*

7:00 a.m. Registration, Networking & Information Fair

Continental Breakfast Buffet Opens at 7:15 am

8:00 a.m. Opening Keynote General Session

2023 Employee Benefit and Hiring Trends

Jim Horrell, Senior Benefits Consultant, Lockton Companies
Kyle Lorettelli, Director of Market Operations - Tennessee, Ashton Carter

9:00 a.m. Concurrent Breakout Sessions (3)

Reframing Family Building Benefits to Achieve Equity and Inclusion

Michelle Lafalette, Vice President & Total Rewards Leader, AON
Sara Tynes, Assistant Vice President, AON

Breaking Down SECURE 2.0 - What you Need to Know (Repeat at 10:45 a.m.)

Jeanne Sutton, Financial Benefits Advisor, Strategic Retirement Partners

Evolutions in Non-Qualified and Equity Compensation Plans

Jeremy Boraks, Vice President Workplace Consulting, Fidelity Investments
Alicia Henson, Vice President, Fidelity Investments

10:15 a.m. Morning Break & Information Fair

10:45 a.m. Concurrent Breakout Sessions (3)

Update on State PFML and Statutory Plans for 2023 and Beyond

Chad Smolinski, Regional Sales Manager, Prudential

Breaking Down SECURE 2.0 - What you Need to Know (Repeat from 9:00 a.m.)

Jeanne Sutton, Financial Benefits Advisor, Strategic Retirement Partners

New Strategies to Engage Your Workforce in their Health Benefits

Karen Stone, Director of Business Engagement Strategies, Vanderbilt Health

12:00 noon Lunch & Information Fair

12:30 p.m. Luncheon Keynote General Session

Modernizing Your Employee Benefits: Walking the Tight Rope of Cost Containment and Employee Retention

Kevin Mattice, Market Leader TN/KY, Gallagher
Stephanie Hawkins, Area Vice President and HR Consulting Practice, Gallagher
Cassandra Williams, Vice President Human Resources, Endodontic Practice Partners

1:30 p.m. Concurrent Breakout Sessions (3)

Financial Wellness - A Peer-to-Peer Moderated Session

Moderator: Jeanne Sutton, Financial Benefits Advisor Strategic Retirement Partners

Total Rewards - A Peer-to-Peer Moderated Session

Moderator: Linda McDougal, Account Executive, Gallagher

Considerations for Self-Funded Programs - A Peer-to-Peer Moderated Session

Moderator: Jay Brown, President - Tennessee, Lockton Companies

2:45 p.m. Afternoon Break & Information Fair

3:00 p.m. Closing General Session

Mission Impossible - Improving Benefits Without Increasing Costs

Ben Merrill, Senior Principal, Mercer
Adrienne Johnson, Benefits Managing Director, Mercer

4:15 p.m. Conference Concludes



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