

Thursday, May 15th

Agenda

8:00 - 8:45 am | Breakfast

Location: West Room

8:45 - 9:30 am | Navigating Uncertainty

To kick things off, Liz Davidson, Founder and CEO of Financial Finesse, will share actionable insights on how HR and benefits leaders can thrive in today's uncertain political, economic, and corporate landscape. Learn how to leverage your financial wellness program to not only support employees during tough times but also strengthen engagement, retention, and overall workplace culture. This session will focus on practical strategies to ensure your organization remains resilient and aligned with employee needs, even in challenging conditions.

9:30 - 10:00 am | Group Discussion: What's Top of Mind Today?

Join us for an exclusive chance to connect with other top HR leaders around the biggest hurdles—and opportunities—shaping the workplace today. From navigating tighter budgets and leaner teams to evolving benefits strategies, this conversation, moderated by Laura Stamps, Senior Consultant and Head of Engagement Strategy, and Greg Ward, CFP® and Director of the Financial Finesse Financial Wellness Think Tank™, is all about your expert perspectives on how to support employees while driving business success.

10:15 - 11:15 am | Partner Panel: Controlling What We Can

How can you optimize your program for even greater impact when so much is up in the air? In this intimate conversation, Financial Finesse partners from Nestlé, Humana, and CVS Health will share strategies for driving engagement, measuring success, and refining their financial wellness programs to tackle today's challenges while continuing to advance employee financial well-being and keeping their organizations' goals in focus.

11:30 - 12:30 pm | Fireside Chat with Carrie Leana and Liz Davidson

Join CEO Liz Davidson and Professor Carrie Leana from the University of Pittsburgh, as they discuss the significant impact of financial stress in the workplace. Professor Leana's research reveals that truck drivers facing high financial stress are far more likely to be involved in preventable crashes, while those with emergency savings experience fewer on-the-job accidents. Additionally, her study on nurses highlights that, despite their empathy, financially stressed nurses struggle to maintain quality care.

This conversation will provide valuable insights into the critical link between financial well-being and workplace performance and how to address financial stress to achieve tangible business results. Q&A will follow.

12:30 - 1:30 pm | Lunch

Location: Greenhouse

1:30 - 2:30 pm | Burnout: And What You Can Do Now

In this session, we will address the elephant in the room: HR team burnout. Dr. Chris Mosunic, PhD, RD, MBA, and Chief Clinical Officer at Calm will share practical strategies to deal with the constant demand and strain many teams feel today. Learn how to recognize early signs of stress, reframe priorities to manage workloads effectively, and implement strategies to create a more sustainable, balanced approach for you and your team.

We'll also share actionable insights on optimizing your financial wellness benefits to better support employees and create a healthier work environment. Don't miss this opportunity to learn what you can do now to foster well-being for yourself and your team while driving better outcomes for your organization with a more sustainable approach to organizational wellness.

2:45 - 4:15 pm | Trends, Innovation Updates, and What's Next?

Our innovation constantly pushes us to deliver deeper personalization and to root out friction, making it ever-easier for employees to engage in their financial wellness, maximize all benefits provided to them, and take life-changing actions seamlessly. With 10 FinTech and AI awards in just over a year, tech will be central to this discussion, but we'll also highlight the critical role that tailored content and experiences that speak to employees' unique challenges, goals, and backgrounds, play in our innovation roadmap.

In this session, you'll hear about the latest industry trends, and how Financial Finesse is responding through exciting innovations including: culturally relevant content and events, dynamic guides for major life events, powerful integrations (including our recent integration with SecureSave), leveraging AI to answer benefits questions instantly and accurately, and expanding globally to meet rising demand for financial wellness.

Before we break for cocktails, we'll open the conversation up to the group to explore the future of financial wellness programs. Together, we'll reflect on the key takeaways from today's sessions, focusing on what resonated with you, what sparked new ideas, and how we can help turn those ideas into realities to transform even more financial lives, enhance your employer brand, strengthen workplace culture, and maximize ROI.

4:15 pm | Cocktail Hour