

Thursday, May 14th

Agenda

8:00 am - 8:45 am**Breakfast**

Location: West Room

8:45 am - 9:15 am**Opening Keynote: The Power of Resilience**Presented by Special Guest, **Carl Nassib**, Former NFL Player and Founder of Charitable Giving Platform, Rayze

Carl's journey defies the odds at every turn. He was a Penn State walk-on who earned a full scholarship, came one financial crisis away from never finishing college, then beat the odds to reach the NFL, where he played seven storied seasons. But his most courageous play came off the field: becoming the first openly gay NFL player, then retiring from the game to pursue an even bigger vision.

Today, as the founder of Rayze, he is building the infrastructure that ensures philanthropy scales alongside modern financial systems.

Carl will share what it really takes to turn setbacks into breakthroughs and why resilience, mindset, and playing the long game are the ultimate competitive advantages.

9:15 am - 9:45 am**Group Discussion: 2026 Pulse Check**

An unscripted, moderated conversation on the forces reshaping HR and benefits today, led by **Laura Stamps**, Director of Program Development and Engagement Strategies. How are global uncertainty, rapid AI advances, persistent employee financial stress, and other pressures impacting your work? How are shifting constraints, like corporate mass email limitations, and evolving employee engagement patterns affecting your benefits communication strategies? What's coming next? Which changes feel energizing—or unsettling? We'll explore together.

9:45 am - 10:15 am**The Double-Edged Revolution: How AI Can Fix the Financial Crisis It Helped Create**

Founder and CEO **Liz Davidson** shares a grounded look at the current state of AI—cutting through the hype to focus on what truly matters for employers and employees alike. Its potential for positive change is enormous, but it needs to be deployed safely, responsibly, and with the best interests of employees in mind. Liz will explore what AI means for us as professionals, how it is likely to reshape the workforce, and the implications HR leaders need to be thinking about now. She will also share how purpose-built AI can enhance personalized financial coaching—amplifying and scaling the impact that only human coaches can provide.

10:15 am - 10:30 am**15-minute Break**



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10:30 am - 11:15 am

Innovation Lab: Agentic AI

Join **Liz Davidson** and **Edwin Jongsma**, VP of AI and Integrations, for a peek behind the curtain. We'll start with immediate concerns—hallucinations, bias, and advice that looks right but isn't—and provide a refresher on how our closed-circuit AI system guarantees safety. Then, we'll highlight advancements in benefits integration. You'll see how Aimee AI Chat answers any benefits questions, and surfaces benefits at exactly the right moments, removing friction and helping employees move from "I should" to "done." You'll also get an early look at what's next: agentic AI that goes beyond Q&A to deliver nuanced coaching flows informed by our experts, and even complete key actions—such as opening emergency savings accounts or optimizing HSA contributions—to drive meaningful impact at scale.

11:15 am - 11:30 am

15-minute Break

11:30 am - 12:30 pm

How'd They Do That? Powerful Client Success Stories

Laura Stamps host leaders from **Comcast**, **Amrize**, **Ally** and **Hearst**—each of whom achieved remarkable outcomes through creative, innovative initiatives. Hear their stories and learn exactly how they did it.

12:30 pm - 1:30 pm

Lunch

Location: The Greenhouse

1:30 pm - 2:30 pm

Fireside Chat: The ROI of Financial Stability

If you joined us last year, you got a preview of Professor Carrie Leana's groundbreaking research on financial stress and the risk it introduces to the workplace. This year, we go deeper.

Join CEO **Liz Davidson** and **Professor Leana** from the University of Pittsburgh as they unpack the measurable impact of financial strain on employees. Her research shows that financially stressed truck drivers are far more likely to be involved in preventable crashes than those with emergency savings. In healthcare, even the most empathetic nurses struggle to maintain quality care when under financial pressure.

Based on her findings, Professor Leana will make the business case for financial wellness and dig into securing executive sponsorship, resources, and support to amplify the success of your existing programs.

2:30 pm - 2:45 pm

15-minute Break



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2:45 pm - 3:30 pm

Our 2026-2027 Roadmap: Deeper Financial Transformation, at Much Greater Scale

AI is central to our 2026-2027 roadmap, but so are our coaches. AI can help provide personalized decision-making support at scale, but coaches—through one-on-one sessions and interactive events—create the empathy, motivation, and accountability needed to truly transform financial lives.

That's why we're doubling down on coaching.

We will be unveiling new innovations designed to humanize our coaches, bringing their expertise, personality, and guidance to life in ways that feel less like a platform and more like a relationship. And we're building communities around them: peer networks and shared experiences that break down the shame and isolation that keep people financially stuck, turning individual users into connected participants in their own financial transformation.

3:30 pm - 4:00 pm

Takeaways & What's Next

In a time of unprecedented uncertainty and financial stress, your work to support employees' financial (and overall) well-being is more important than ever. In this session, we'll reflect on the day's key insights. What resonated? What sparked new ideas? And how can we help turn those ideas into real-world impact?

4:00 pm - 5:30 pm

Cocktail Mixer & Innovation Celebration

Close out the day with a celebratory toast. Connect, unwind, reflect, and relax.