

Atlanta Healthcare & Retirement Plan Summit



ABOUT ONEDIGITAL

OneDigital delivers strategic advisory consulting and technology-forward solutions to more than 85,000 employers across the nation. As employee health care, wellness and workplace benefits continue to converge, businesses of all sizes have relied on OneDigital's exceptional advisory teams for counsel in employee benefits, wellbeing, human resources, pharmacy consulting, property and casualty solutions, as well as the retirement and wealth management services provided through OneDigital Investment Advisors. OneDigital's commitment to technology and innovation enables its 3,000 advisors to deliver the most modern and intuitive customer experience anywhere in the industry. OneDigital has been named as a Best Place to Work in Insurance by Business Insurance. **For more information, visit onedigital.com.**



At OneDigital, we harness the power of one to solve complex challenges for businesses and people. Watch the video and learn more.



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The Sketch Effect is a creative services company dedicated to making ideas understandable and actionable through awesome visual communication. Anyone with a big idea to share can find value in Sketch Effect's suite of visual communication solutions, whether it's an animated explainer video or live, real-time Graphic Recording at a conference, workshop or meeting (either in-person or virtual). The Sketch Effect's talented team of illustrators, Graphic Recorders, and animators serve the world's top brands to make their messages more efficient, effective and enjoyable.

The Scetch Effect will be live, on-site graphically recording today's Summit. After the event, a copy of the illustrations will be sent via email for all attendees to view.

AGENDA

THURSDAY, JUNE 9TH, 2022

| | |
|----------|---|
| 11:00 AM | Arrivals and Networking |
| 11:20 AM | Summit Kick Off with David Griffin, OneDigital |
| 11:30 AM | Retention Reset with David Hughes, OneDigital |
| 12:00 PM | Break for Lunch |
| 12:25 PM | Mental Health in the Workplace: Tools to Support Leaders on the Front Line with Lucy Roberts, OneDigital |
| 12:55 PM | Solving the Mystery of Retirement Plan Fees: What Every Fiduciary Needs to Know with Greg Fiore, OneDigital |
| 1:25 PM | Break |
| 1:35 PM | Protect What Matters: Don't Let Your Retirement Account be a Cybersecurity Risk with David Schneier, Fidelity |
| 2:05 PM | Transforming with Employee Experience with April Husted, Jennifer Pearson, Wes Cowen and Heather Rab- inowitz, OneDigital |
| 2:50 PM | Closing Remarks |
| 3:00 PM | Departures |



Grab a sweet treat on your way out!
King of Pops will be available outside.
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We offer employers and individuals a holistic experience.

END-TO-END CAPABILITIES

EMPLOYEE BENEFITS + INSURANCE

We deliver benefits strategies that align with the health care needs of organizations at all stages of their growth journey. We put data, insights and guidance to work for employers to help them make smarter choices about health care spending and focus on taking care of their most important investment – their people.

FINANCIAL SERVICES

We tailor retirement plans, wealth management conversations and financial wellness programs to meet individuals' needs. We work with employers to reevaluate their retirement programs to ensure that they provide the tools and individual guidance that employees need to stay focused on meeting today's challenges, while preparing for a successful tomorrow.

WORKFORCE + HR CONSULTING

We help employers build exceptional workplaces by developing their people and building winning teams. Via our integrated, personalized approach, we partner with employers to expertly manage programs for their workforce. This consulting expertise helps business leaders stay out of the weeds and ensures that all aspects of talent acquisition and retention strategies become a competitive advantage for their business.

PROPERTY + CASUALTY INSURANCE

We help employers understand the potential risk and liabilities their business could face and provide guidance to safeguard their company – in both the good times and bad. By delivering a tailored, comprehensive risk strategy, we help businesses manage risk while maximizing the protection of the business and its people.

We solve complex problems.

Insurance, financial services and HR are complex business necessities for employers, further complicated by many choices, tools, regulations and challenges. Simultaneously, employees and their families struggle to access affordable health care and get out of debt. No one is better positioned to solve both the business challenge and the people challenge.

ONE TEAM

We make it easy for employers to work with a single team and build a holistic workforce strategy that enables people to do their best work and live their best lives.

ONE SOLUTION

We provide a single platform for employers of all sizes, enabling them to deliver modern financial services, insurance and HR strategies that actually benefit their people.

ONE PURPOSE

Our simple focus on doing well by doing good means that we can help businesses grow and help people recognize their full potential.



PRESENTERS



April Husted, CEBS, REBC, RHU
Senior Managing Principal,
OneDigital



Lucy Roberts, PHD
Practice Specialist,
Health & Wellbeing,
OneDigital



David Griffin, C(k)P
Senior Vice President of
Retirement Services,
OneDigital



David Hughes, SPHR
Practice Leader,
HR Consulting,
OneDigital



David Schneier, CISSP, CTPRP
Workplace Cyber Assur-
ance & Support,
Fidelity



Greg Fiore
Senior Vice President of
Retirement Services,
OneDigital



Heather Rabinowitz
Vice President of
Member Engagement,
OneDigital



Jennifer Pearson, AIF, QKA
Senior Vice President of
Retirement Plan Consulting,
OneDigital



Wes Cowen
Vice President
of Consulting,
OneDigital

NOTES

ACTION ITEMS *List the next steps you plan to take and how you can apply what was discussed.*

1.

2.

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Mental Health in the Workplace: Tools to Support Leaders on the Front Line

Lucy Roberts, OneDigital

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Solving the Mystery of Retirement Plan Fees: What Every Fiduciary Needs to Know

Greg Fiore, OneDigital

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Protect What Matters: Don't Let Your Retirement Account Be a Cybersecurity Risk

David Schneier, Fidelity

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2.

Transforming the Employee Experience

April Husted, Jennifer Pearson, Heather Rabinowitz and Wes Cowen, OneDigital

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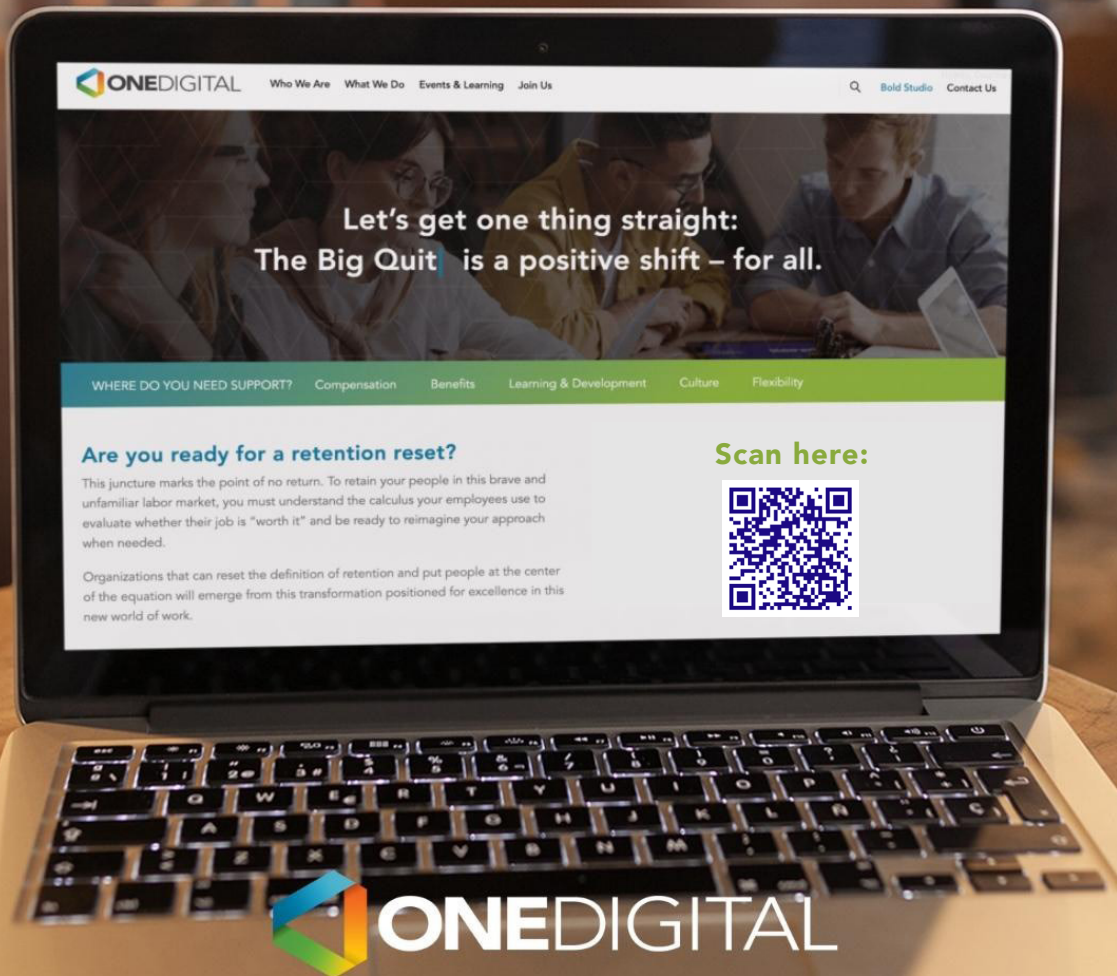
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Are you ready for a retention reset?

Check out our latest fresh thinking, curated to help businesses attract and retain talent in this brave and unfamiliar labor market.

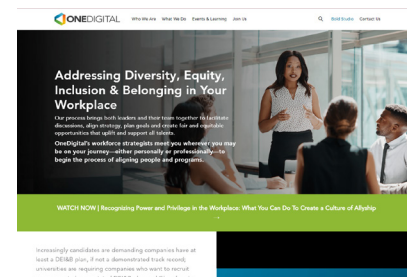
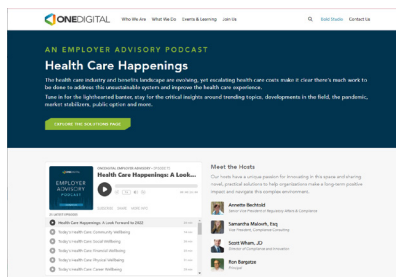
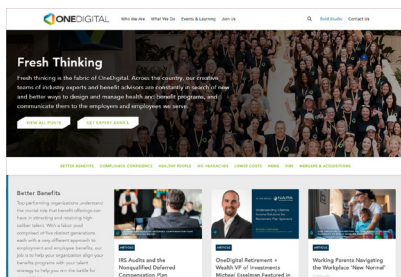
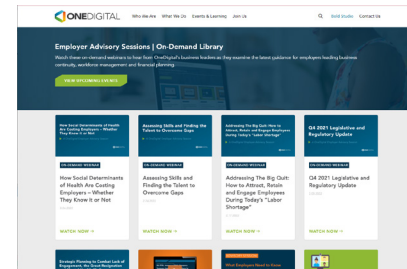
onedigital.com/retention-reset/



We lead market trends

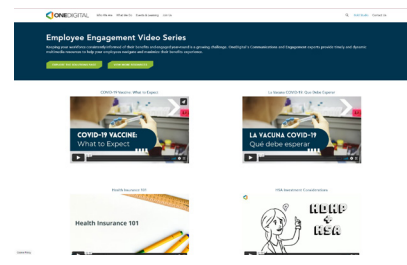
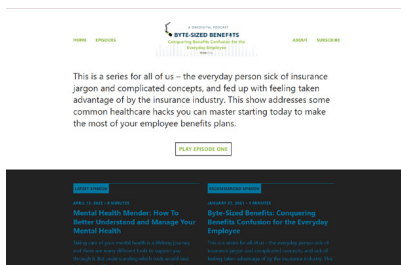
EMPLOYER RESOURCES

- Employer Advisory Session Library
- Fresh Thinking Blog
- Healthcare Happenings Podcast
- Diversity, Equity, Inclusion & Belonging Hub



EMPLOYEE RESOURCES

- Byte-Sized Benefits Podcast
- Engagement & Wellbeing Calendar
- Employee Engagement Video Series



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