

The Employee Benefit Research Institute's Financial Wellbeing Research Center

Harnessing data to improve employee financial wellbeing.

Mission

The **Financial Wellbeing Research Center (FWRC)** is dedicated to conducting rigorous research to evaluate the efficacy of employer financial wellbeing programs. This includes conducting surveys and examining various financial wellbeing datasets from industry providers and publicly available sources. Research findings and their implications are discussed in quarterly center meetings, financial wellbeing symposiums, and educational webinars reaching diverse benefits stakeholders.

Why Partner With the FWRC?

- ✓ Participate in ongoing and focused knowledge sharing with senior benefits leaders — including other Financial Wellbeing Research Center partners.
- ✓ Ensure the continued in-depth, fact-based examination of financial wellbeing issues.
- ✓ Engage with professional center staff to define and analyze key research and assess implications and insights.
- ✓ Provide professional development opportunities for your organization's researchers and experts, who can work with staff researchers.
- ✓ Provide feedback on research and analyses before publication.
- ✓ Plan and participate in the annual Financial Wellbeing Symposium.
- ✓ Receive sponsorship recognition for the Financial Wellbeing Employer Survey, in addition to providing input on survey design and receiving full survey results.

Past center partners include **AARP, American Express, Bank of America, Church Pension Group, Financial Finesse, HealthEquity, J.P. Morgan, Mercer, National Endowment for Financial Education (NEFE), and Prudential.**

Cost of Investment: \$29,000.

Contact Masha Romanchak at Romanchak@ebri.org or (202) 775-6360 to become a center partner today. For detailed information, visit www.ebri.org.

“Adequately preparing for retirement during working years is essential for strong retirement confidence later in life.”

— Greg Ward, Financial Finesse

Financial Wellbeing Symposium

Held annually in fall, this exclusive event commences with a public seminar, shifting to an invite-only afternoon of collaborative sessions for financial wellbeing leaders.

This study center is sponsored by the Employee Benefit Research Institute Education and Research Fund, a 501(c)(6) nonprofit organization.

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RESEARCH INSTITUTE