

# Nebraska Chapter



## Financial Wellness

June 12, 2018

The Nebraska Chapter ISCEBS invites you to attend our June program "Financial Wellness" on Tuesday, June 12th at Union Bank and Trust, Pine Lake Basement Meeting Room, 6801 S. 27th Street, Lincoln, NE.

Our first speaker, Lee Gold, EA, Mercer, will be covering the state of the market and what Mercer sees as best practice. He'll also be sharing some new research from Mercer on the area of financial wellness.

Next will be a Financial Wellness case study presented by Jason Hemenway, Union Bank and Trust and Teena Keslar, Nelnet: Learn about how Union Bank and Trust and Nelnet team up together to develop Financial Wellness education materials for the Nelnet associates and discuss ideas on how to continually increase participation surrounding their Retirement Education topics. Discussion of the different tactics they have used over the years and how having a flexible Retirement Educator as your partner makes a difference. Finally, Statistics will be shared to show how certain changes made a positive impact to participation.

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**DATE:** Tuesday, June 12, 2018

**TIME:** 8:00 – 8:30 am – Registration and Light Breakfast  
(provided by Nelnet)  
8:30 – 10:30 am - Presentation

**LOCATION:** Union Bank and Trust  
6801 S. 17th Street  
Pine Lake Basement Meeting Room  
Lincoln, NE 68512  
([Directions](#))

**COST:** \$30 - Chapter Members  
\$40 - Nonmembers

**REGISTRATION:** Please [click here](#) to register.

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## SPEAKERS



**Lee D. Gold, EA**  
**Principal and Wealth Consultant**  
**Mercer**

Lee has been with Mercer for over 20 years and has over 30 years of employee benefit consulting experience. At Mercer, he has consulted with employers regarding; plan design, and risk management strategies for their pension, defined contribution, and retiree medical programs. His passion for optimal plan designs has led to creative and innovative solutions, as well as numerous speaking engagements, primarily on the topic of risk-sharing pension plan designs. With employees increasingly being asked to take more individual responsibility for their own health and wealth, Lee made the decision to expand his consulting focus beyond retirement, to also include financial wellness. Consequently, Lee spent the last several years consulting with companies on their financial wellness programs, helping them with strategy development and execution. With this background and experience, Lee is now helping employers tackle a broad range of challenges across retirement, investments, and financial wellness. Lee graduated Cum Laude from Brigham Young University with a bachelor's degree in statistics and is an Enrolled Actuary.



**Jason Hemenway**  
**Financial Education Team Lead**  
**Retirement Plan Services**  
**Union Bank & Trust Company**

Jason has been employed at Union Bank & Trust Company since 2013 and currently serves as the Financial Education Team Lead for Retirement Plans Services within the Trust division at Union Bank & Trust. Jason has over 12 years of financial industry experience as well as serving as a faculty member at Doane University for nearly 5 years for the Master's degree program. Jason has a Bachelor of Art's degree from the University of Nebraska-Lincoln and a Master's of Art's in Management – Leadership degree from Doane University.

**Teena Keslar, CEBS**  
**Benefit and Wellness Manager, People Services**  
**Nelnet**

Teena has been employed at Nelnet since 2007 and currently manages the Benefit and Wellness programs for Nelnet's 6,000 plus employees located across the United States. Teena has a Bachelor's degree in Business Management with an emphasis in Human Resources from the University of Nebraska-Kearney and earned her CEBS designation in 2017.



This presentation qualifies for two (2) CEBS continuing professional education (CPE) credits. Visit [www.cebscpe.org](http://www.cebscpe.org) for more information.



*July/August*

*RX & Alternative Payment Strategies*