

Member-Sponsored Webinar

Attracting Talent in 2023 and Beyond: Financial, Holistic and Overall Wellness Strategies

Wednesday, February 15, 2023**11:00 a.m. to 12:00 p.m. ET****Virtual Platform: Zoom****FREE for PA Chamber Members and Non-Members**

It's the great migration or perhaps even the great realignment — talent is the great opportunity in the 21st Century. Financial Wellbeing has become the guiding light for employees and provides a chance for businesses to reimagine talent strategy. Moreover, as a society we are engaging with an increasingly diverse workforce. Employers need to understand the impact that this diversity has on talent attraction, retention and workplace benefit programs. The emphasis is increasingly on “holistic wellness,” — which includes mental health, physical health, and financial security considerations.

In this session, we will share new research from Bank of America, unpack key trends impacting the future of talent, including a special focus on the topic of Women and Financial Wellness.

Program Highlights

- Define financial wellness from the employee voice
- Identify unique approaches to recruit and retain critical talent
- Extend support that contributes to your employees' overall wellbeing

Following the speakers' presentations, they will engage in a moderated Q&A session.

Attracting Talent in 2023 and Beyond: Financial, Holistic and Overall Wellness Strategies**Date:** Wednesday, February 15, 2023**Time:** 11:00 a.m. to 12:00 p.m. ET**Format:** Virtual — Zoom**Cost:** Free for PA Chamber Members and Non-Members

After registering, you will receive a confirmation email containing information about joining the webinar.

For more information on this event and other upcoming PA Chamber programs, visit pachamber.org/events.

About the Speakers



Keri McBeth graduated from Messiah University in 2011 with a Business Administration Major and Human Resources Concentration. Since graduating, Keri has worked at Martin's Famous Pastry Shoppe, Inc. in the HR Department. She began her career as an HR Generalist and has since been promoted to HR Manager, overseeing a team of a dozen employees who specialize in all aspects of Human Resources. Martin's Famous Pastry Shoppe, Inc. is a family owned, bread and roll manufacturer headquartered in Chambersburg, Pennsylvania with over 1,200 employees nationwide.



Hazel Durand

RPWS, Director, Divisional Leader- Employee Benefits Specialists

Hazel Durand is a Divisional leader of a team of Employee Benefits Consultants who support our Bank of America clients with benefits trends, consulting conversations and solutions. Hazel leads a team of 20 Benefits Consultants across the Northeast and Mid-West regions. She has held various positions within Retirement, Benefits and Advisory businesses over the last 30 years helping employers assess, identify and implement the best possible programs to meet the demands of their industry and employees. Hazel holds the FINRA series 7, 24 and 66 licenses and Certified Plan Fiduciary Advisor (CPFA) certifications. She currently resides in the New England area with her family.



Mason S. Flinn joined the Retirement Group as an Employee Benefits Specialist working with Merrill Advisors and Bank of America Bankers serving the Greater Philadelphia markets. Mason provides consulting for corporate benefit plans which includes 401(k), Defined Contribution Plans, Defined Benefit Plans, Health Savings Accounts, Equity Programs, Non- Qualified Deferred Compensation plans and Employee Banking and Investing programs which include Financial Wellness. Prior to joining Bank of America, Mason held sales leadership, retirement and benefits consulting and Institutional client relationship management roles with three national firms. He was a founding member of NAPA, graduated from Hampden-Sydney College and was a Varsity Lacrosse player with experience in the NCAA National Championship Tournament.



Manuel Mar Jr., CTP is the SVP and Sr. Relationship Manager within the Northeast Middle Market division in the Global Commercial Banking sub-line of business within Global Banking and Markets for Bank of America Merrill Lynch. In this role, he leads a team of specialists supporting Middle Market institutions with annual revenues of \$50MM to \$2BN+, focusing on building valuable longterm relationships by providing expertise in credit & finance, treasury management, capital raising & risk management, international solutions, and employee benefits & investment management products. Manny joined the firm in February 2014 in a similar role with the Healthcare, Education, and Not-For-Profit division before transitioning to his current role in December 2018.

Prior to joining the firm, Manny served as Relationship Manager with J.P.Morgan, where he managed a client portfolio comprised of institutions within the Healthcare industry in the Northeast and Mid-Atlantic states. In addition, he also served as Controller supporting Investment Banking Risk under the Finance & Business Management division. Manny is FINRA Series 7 & 63 licensed, holds an M.B.A. with a concentration in Finance from Marymount University and has a B.S. in Economics from The Pennsylvania State University. He is a J.P.Morgan Credit Training Program graduate and was awarded the Certified Treasury Professional designation from the Association for Financial Professionals in December 2016.

Manny is involved both personally and professionally in the Pennsylvania, Delaware, New Jersey and New York City community. He is a Vice Chair at the PA Chamber of Business and Industry, a Board Member at Community Volunteers in Medicine, served on the Advisory Board of the Young Professional

Network at the Greater Philadelphia Hispanic Chamber of Commerce, and has volunteered with Habitat for Humanity Philadelphia, Philabundance, Cradles to Crayons, Easterseals Delaware & Maryland's Eastern Shore, the Lenox Hill Neighborhood House in New York City, the Food Bank For New York City, the Grameen Foundation, Women's World Banking, and The Pennsylvania State University Advisory Board. Manny is also the Executive Sponsor of the Pennsylvania Delaware County Regional Council and an active member of the bank's Employee Networks — the Military Support & Assistance Group (MSAG) and the Disability Advocacy Network (DAN).



Kai R. Walker, Head of Inclusion Transformation, Retirement & Personal Wealth Solutions.

As head of Inclusion Transformation, KAI WALKER ensures that the delivery of all Retirement & Personal Wealth Solutions (RPWS) products and services are effective in meeting the needs of diverse clients and communities served by the organization. In this capacity, Kai collaborates with colleagues and partners to enhance employee well-being, foster financial inclusion and address the unique challenges confronting diverse populations.

Kai began his career as an executive in the Merrill Lynch Global Wealth Investment Management organization and recently served as Enterprise Relationships Director. In this role, he was responsible for delivering innovative thought leadership, actionable ideas and relevant solutions to clients as an effective means in attracting, retaining, and motivating employees in an increasingly competitive business environment.

Kai also served as the National Director of Institutional Client Relationships and was responsible for coordinating the service and acquisition functions of the institutional and national client segment which maintained over \$200 billion in assets and 4 million accounts under management.

Kai is a leading industry professional with more than 25 years of experience in retirement and financial services. Prior to joining Bank of America, he held a variety of key positions with market-leading financial services firms where he focused on helping corporate executives meet their fiduciary obligations and equipped and empowered their employees to achieve financial wellness.

Kai holds a B.S. in Mathematics from Gordon College and maintains certification in Economics from the University of Wisconsin. Kai holds FINRA Series 7, 66 and 24 registrations. He is an acting member of the American Economic Association, NASPP DEI Taskforce and the DCIA D&I Leadership Council. Kai is also member of the firm's Black Executive Leadership Council and serves as co-executive sponsor for both the Jacksonville Inter-Generational Employee Network and RPWS D&I Council.

Continuing Education Credits

SHRM Credits

The Pennsylvania Chamber of Business and Industry is recognized by SHRM to offer Professional Development Credits (PDCs) for the SHRM-CPSM or SHRM-SCPSM. This program is valid for **1 PDC for the SHRM-CP or SHRM-SCP**. For more information about certification or recertification, please visit www.shrmcertification.org.



The Pennsylvania Chamber of Business and Industry is recognized by SHRM to offer Professional Development Credit (PDC) for SHRM-CPSM or SHRM-SCPSM recertification activities.

CLE Credits

This program has been approved by the PA Continuing Legal Education Board for **1 hour of substantive law, practice** and procedure CLE credit and 0 hours of ethics, professionalism or substance abuse CLE credit.

CPE Credits

CPE Credits: 1

Program Sponsor PX177225

Prerequisites: None

Level: **Management**

Objective: To provide an update on human resources best practices to ensure a diverse workforce that ultimately provides savings to a company's bottom line.

Note: To verify attendance and earn credits, all attendees are required to be logged into Zoom.

HR Certification Institute Credits

This activity has been approved for **1 (HR General) recertification credit hour** toward GPHR, HRBP, HRMP, PHR and SPHR recertification through the HR Certification Institute. Please be sure to note the activity ID number on your recertification application form. For more information about certification or recertification, please visit the HR Certification Institute website at www.hrci.org.



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