

**Filene** Research Institute 



# **A HOLISTIC APPROACH TO WELL-BEING**

Filene's Center for Member Well-Being: What's Ahead and Why It Matters

WELCOME

# TODAY'S AGENDA

1. Welcome
2. Why Member Well-Being?
3. Introducing Dr. Mathieu Despard
4. The Center's Impact & Key Focus Areas
5. Panel Discussion
6. Q&A

YOUR HOST



**JESSICA GAMACHE**

Head of Research  
Filene Research Institute

THANK YOU INNER CIRCLE

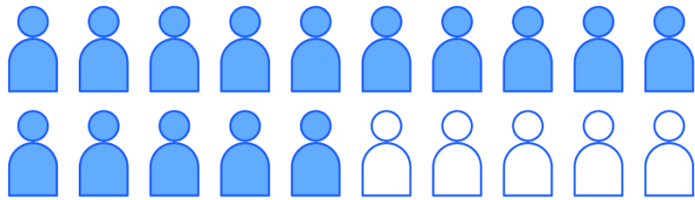
# MEMBER WELL-BEING SPONSORS



WHY IT MATTERS

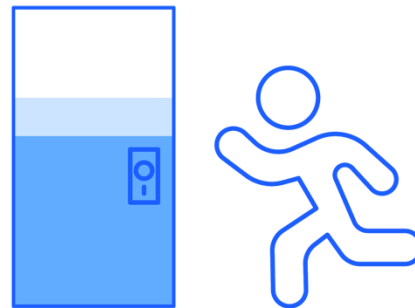
# WHY MEMBER WELL-BEING

## EVOLVING CONDITIONS



- **77% of U.S. adults say they are not completely financially secure**, up from 75% in 2024 and 72% in 2023<sup>1</sup>
- **Financial stress or well-being is a key component of overall** mental, physical, and social health<sup>3</sup>

- **57% of employees are considering quitting their job for one that supports their well-being**; 70% of executives plan to quit for the same reason<sup>2</sup>



## AN INDUSTRY WELL-POSITIONED TO EXCEL AND DIFFERENTIATE



- Long-standing emphasis on financial well-being
- People, practices, and products in place to build on
- Existing community partnerships to leverage

<sup>1</sup> [Bankrate Financial Freedom Survey, 2025](#) <sup>2</sup> [Deloitte C-Suite's Role in well-being, 2022](#) <sup>3</sup> [TwinStar Credit Union 7 Ways that your Financial and Social Wellness Can Intersect](#)

# IMPACT

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# FILENE FELLOW



**DR. MATHIEU DESPARD**

Senior Researcher  
Center for Social Development  
Washington University in St. Louis

- Served on the **Academic Research Council for the Consumer Financial Protection Bureau** from 2021 to 2023
- Published over **70 peer-reviewed journal articles and book chapters and 75 research reports and briefs**, along with being cited in the 2025 Economic Report of the President
- An adjunct Assistant Professor at the Kenan-Flagler Business School at the **University of North Carolina at Chapel Hill**
- Prior to academia, worked for **16 years with nonprofit organizations serving low- and moderate-income households** in economic empowerment and healthcare

WELCOME

# SPONSOR PANEL



**PAM COHEN**

Chief Operating Officer



**JILL SAMMONS**

Senior Vice President, Marketing,  
Well-Being & Wealth Advisory



MEMBER WELL-BEING

## KEY FOCUS AREAS



**Evidence-Based  
Financial Well-Being  
Practices and Solutions**



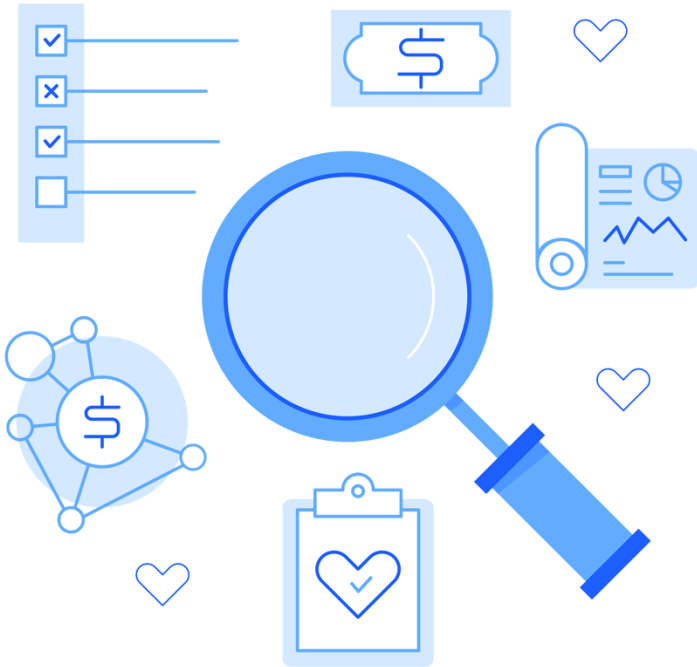
**Sustainable Products  
and Partnerships for  
Overall Well-Being**



**Well-Being-Driven  
Practices and Programs  
for Employees**



# KEY FOCUS AREAS



## Evidence-Based Financial Well-Being Practices & Solutions

- **Identify and analyze proven strategies** to enhance members' financial health and resilience.
- **Effectively leverage data** to design and deliver financial solutions that are both effective and impactful.
- **Understand the interconnectedness** of financial well-being and other aspects of life to create a more comprehensive approach to member support.

# KEY FOCUS AREAS



## Sustainable Products & Partnerships for Overall Well-Being

- **Create innovative, outcome-based products and services** that go beyond traditional financial offerings to address holistic well-being needs.
- **Build strategic partnerships** to offer a wider range of support and resources.
- **Identify sustainable approaches** that can be effectively integrated into existing practices and structures.

# KEY FOCUS AREAS



## Well-Being-Driven Practices & Programs for Employees

- **Identify the critical link** between employee well-being and member well-being so that employees are better equipped to serve members.
- **Explore the innovative approaches** to a supportive workplace environment that prioritizes employees' overall well-being.
- **Identify and implement strategies** that equip employees with the necessary skills and knowledge to guide members toward improved well-being outcomes.

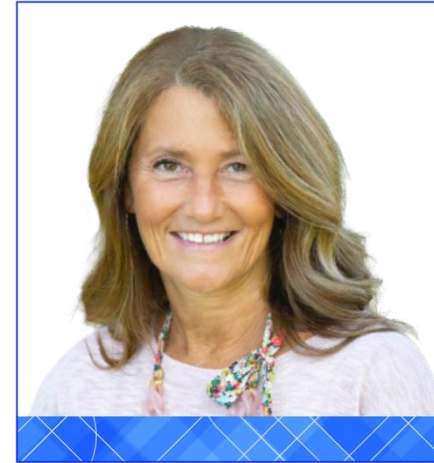
MEMBER WELL-BEING

# PANEL DISCUSSION



**PAM COHEN**

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THANK YOU

# ACKNOWLEDGMENTS

Filene thanks its strategic partners supporting the Center for Member Well-Being, and for helping make this research possible.



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