



Financial Well-Being Programs - The Standard 401(k) is Not Cutting it Any Longer

About Our Moderator and Panelists

Moderator

Matt Gregory – Matt has been actively involved with employee benefits in several different roles over the past 19 years. For the past seven years he has successfully fulfilled successively more responsible roles, leading to his current position as Vice President, Client Advocate.

Before joining Lockton, Gregory served as sales director at Benefitfocus, where he focused on the 500 to 5000 employee market sector in Tennessee, Kentucky, and Alabama. Prior to that, he spent four years at Unum and four years at BB&T Insurance Services. Gregory earned a bachelor's degree in business administration from the University of Mississippi and holds a Master of Business Administration from Auburn University.

Panelists

Todd M. Colburn – has been a Series 7 and 66 Licensed Registered Representative since 1997, working with businesses and families to help achieve financial security. In addition to providing holistic business planning, he specializes in the corporate retirement plan market. He serves as the Retirement Planning Specialist for the Pruett Financial Group in middle and East Tennessee.

Todd earned his Certified Financial Planner™ from the Certified Financial Planner Board of Standards, his Chartered Retirement Plans SpecialistSM from the College for Financial Planning, his Retirement Income Certified Professional® from The American College and received his Bachelor of Business Administration in Accounting & Finance from Belmont University.

Adam Parsons – is an Account Executive with Spring, a top rated financial wellness benefit firm that is committed to democratizing access to financial education and guidance, so that millions more people can build their financial health, knowledge, and security. Spring helps employees reduce financial stress and helps companies recruit and retain top talent while saving them money through increased employee productivity. Since 2017 Adam has sought to bring his financial wellness offering to local nonprofits and companies to address the increasing amount of financial stress that employees are facing.

Adam earned his degree from the University of Tennessee, Knoxville .

Donna Spears – Donna is a Vice President Relationship Officer at First Horizon who helps companies complement their benefits offering with a no cost financial educational benefit. Donna truly cares about her communities and neighbors. Currently she works with over 200 companies, universities, and member organizations developing customized financial educational series tailored to their unique needs. In addition, Donna trains the First Horizon bankers at 110 locations to deliver the financial educational content with unique and fun themes i.e. "Biscuits with your Bankers" and one on one financial guidance counseling.

When Donna is not traveling throughout Tennessee, Mississippi, and Arkansas for her job she can be found on a bicycle, enjoying live entertainment with her honey Greg, and having adventures with her nieces and nephews.