

# ANNE LESTER

SAVE SMART, WIN YOUR WAY

*Today's top voice for people under 40:*

## RETIRE HAPPY—ON YOUR TIME AND TARGET



### ANNE LESTER:

- Retirement maven to Millennials & GenZs
- Unparalleled subject matter expert
- Media commentator with global reach
- Speaker and moderator

**Anne Lester** is on a mission to help rising leaders become retirement-ready—and no one is more qualified. Over the past 28 years, Anne:

- Was Head of Retirement Solutions for JPMorgan Asset Management for 20 years
- Holds patents for her progressive design to simplify the retirement planning process
- Co-founded the Aspen Leadership Forum on Retirement Savings (with AARP)

Anne—a Fulbright research fellow—earned degrees from John Hopkins and Princeton. Her two children—a Gen Z and a Millennial—are getting retirement-ready.

### MEDIA COVERAGE

BARRON'S

Bloomberg

Forbes

THE  
WALL STREET  
JOURNAL

Kiplinger



### SPEAKING ENGAGEMENTS

AARP



Wharton  
UNIVERSITY OF PENNSYLVANIA

P&I

J.P.Morgan

### WHAT PEOPLE ARE SAYING

- “ A pioneer and innovator.  
— Morningstar
- “ Anne brings smarts, compassion, and humor to an intimidating topic.  
— TEDx Council Member
- “ A trusted voice.  
— Aspen Financial Security Program

### KEYNOTES, Virtual and Live

#### Under 40? Retire Happy, On Your Time And Target

If you're like most people, you struggle to save—and you squirm thinking about retirement. You need Anne Lester. In this interactive keynote, Anne—an industry legend in managing retirement assets—reveals the ingrained biases that work against saving. She shares true stories, her latest data, and highlights the big impact of small changes. And with the empathy and humor of your favorite aunt, she walks you through the 4-step framework that can help you save smart and win your way. You'll walk away inspired, with 4-step tools and the greater confidence that comes from seeing yourself in a fundamentally new way—now, and in the biggest future.

#### Organizations, Help Your People SAVE AND WIN

The painful truth is that most employees fall dangerously short when saving for retirement. Close the gap, and your rising leaders will have measurable reasons to give you high marks. They'll also be more engaged at work, and they'll stay with your organization longer. Let Anne help you win the talent war by teaching your people how to become more financially fit. Audiences walk away with her 4-part framework, simple savings calculator, and assessment.



### BRING ANNE TO YOUR AUDIENCE

Rising leaders everywhere want to save smart with a high-trust source like Anne Lester.

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