



In 2018 AFN launched the Work and Wealth Initiative, a working group of funder collaborators with growing interest in philanthropic strategies that leverage the workplace as an asset building platform. This approach came out of direct feedback and conversation from AFN members.

### Goals of this Working Group:

- ▶ Collectively learn more about the emerging field of workplace financial wellness and employer based strategies to share insights that will inform funder's grantmaking and lead to strategic national and place-based investments;
- ▶ Elevate promising innovative approaches that could be individually and/or collectively leveraged by members;
- ▶ Identify responsive, strategic, and actionable new investment opportunities;
- ▶ Connect funders and employers as key stakeholders to encourage them to share information about their workplace financial wellness funding priorities with each other and to inform AFN's collaborative work on this topic;
- ▶ Elevate and illuminate the working group's thought leadership and impact through regional and national partners and grantmaker forums.

### Working Group Members

**Don Baylor**  
The Annie E. Casey  
Foundation

**Samuel Diaz**  
Prudential Foundation

**Jeanique Druses**  
JPMorgan Chase & Co.

**Marissa Guananja**  
W.K. Kellogg Foundation

**Greg Levin**  
BlackRock Social Impact

**Kimberly Ostrowski**  
Prudential Foundation

**Susan Sarver**  
FINRA Investor Education  
Foundation

**Evelyn Stark**  
Metlife Foundation

**Joe Antolin and Leah Mayor**  
Asset Funders Network

## Summary of Working Group Activities

Programming in 2020 will continue to address how employers can strengthen the social contract with employees through means that benefit workers while improving employer recruitment, retention, and productivity. The working group will primarily focus on:

- Understanding what small businesses and local ecosystems require to better address worker financial security
- Understanding the potential for small business to connect quality jobs and financial security

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## Programs to date include:

- **When a Job Isn't Enough: Regional Employee Financial Wellness and the Role of Philanthropy** regional events in San Antonio and Dallas Texas on December 2nd and 3rd, 2019
- **Funder Brief and National Webinar: *When a Job Isn't Enough: Employee Financial Wellness and the Role of Philanthropy*** on September 26th, 2019
- **Grantmaker conversation *Workplace Financial Wellness and the Future of Work*** with Roosevelt Institute on June 4th, 2019
- **Asset Funders Network National Grantmaker's Conference session *The Future of Work is Already Here and How Philanthropy Can Respond*** with speakers Don Baylor, Marissa Guananja, Madeline Janis, Clem Bezold, Andrea Delendorf. The session explored the connection between good jobs and financial security through employer programs and public policy on May 9th 2019

## JOIN US

The AFN Work and Wealth Working Group is made up of AFN members who are interested in supporting the strategic and evidence based growth of the field of Workplace Financial Wellness. The group is open to all AFN members who are currently doing work or exploring future initiatives in this area as well as colleagues who are interested in learning more. The group meets four times a year; once in person and three virtual meetings.

*Funders of the working group have input to help shape and guide the working group's agenda, and receive co-branding on any of the working group related projects, including issue briefs or webinars.*

Join your peers to support the exploration of Workplace Financial Wellness and Wealth Building. For information on how to get involved contact Leah Mayor at [Leah@assetfunders.org](mailto:Leah@assetfunders.org).