Andy Sieg
Head of Merrill Lynch Wealth Management


Prior to his career at Merrill Lynch, Andy served in The White House as an aide to the assistant to the President for Economic and Domestic Policy.

Andy earned a Bachelor of Science in Economics from Penn State University, and serves on the External Advisory Board of the Schnyder Horizons College. He also holds a Marster in Public Policy (MPP) degree from the Harvard Kennedy School (HKS) and serves as a member of the HKS Dean’s Council.

Ben Storey
Director
Retirement & Personal Wealth Solutions
Bank of America Merrill Lynch

Ben Storey is a Merrill Lynch director and retirement executive within Personal Retirement Solutions. He joined the firm in 1997, and throughout his career he has held various senior positions. He speaks regularly on retirement topics including Social Security, health care cost, Merrill Lynch Life priorities and Goals-Based Wealth Management.

Ben holds the Chartered Retirement Planning Counselor™ (CRPC®) designation and is a CERTIFIED FINANCIAL PLANNER™ (CFP®) certificant, a designation awarded by the Certified Financial Planner Board of Standards, Inc. Ben graduated from Florida State University, where he earned a Bachelor of Science degree in economics. He is married and has three children.

Sarbjit Nahal
Head of Thematic Investment
BoFA Merrill Lynch Global Research

Sarbjit Nahal is a managing director and heads the thematic investing strategy team. The global strategy team works to implement the enterprise-wide “A Transforming World” (ATW) framework (Earth, government, innovation, markets, people). This includes addressing thematic issues from both opportunity and risk perspectives—including climate change & extreme weather, education, energy efficiency, food security, green bonds, longevity, millennials, obesity and health & risk perspectives—including climate change & extreme weather, education, energy efficiency, food security, green bonds, longevity, millennials, obesity and health & risk perspectives—including climate change & extreme weather, education, energy efficiency, food security, and health risk perspectives—such as retirement and longevity. He is a Board Member of the National Council on Aging.

Laura Carstensen, Ph.D.
Founding Director
Stanford Center on Longevity

Laura Carstensen is a professor of psychology at Stanford University, where she is the Fairlie S. Dickinson Jr. Professor in Public Policy and founding director of the Stanford Center on Longevity. She is best known for socio-emotional selectivity theory, a life-span theory of motivation. For more than 20 years, Dr. Carstensen’s research has been supported by the National Institute on Aging, and she was honored with a MERIT award in 2005. Her most current empirical research focuses on ways in which motivational changes influence cognitive processing. She is a fellow in the Association for Psychological Science, the American Psychological Association and the Gerontological Society of America.

Dr. Carstensen has chaired two studies for the National Academy of Sciences, resulting in noted reports. The Aging Mind and When I’m 64. She is a member of the MaxArthur Foundation’s Research Network on an Aging Society and serves on the National Advisory Council on Aging to the NIA. She has won numerous awards, including the Kleemeier Award, the Kalish Award for Innovative Research and the Distinguished Mentorship Award from the Gerontological Society of America, as well as the Master Mentor Award from the American Psychological Association.

Dr. Carstensen was selected as a Guggenheim Fellow in 2003. In 2011, she authored A Long Bright Future: Happiness, Health, and Financial Security in an Age of Increased Longevity. She earned a B.S. degree from the University of Rochester and a doctorate in clinical psychology from West Virginia University. She holds an honorary doctorate from the Katholieke University in Leuven, Belgium.

Ben Storey

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