

2024 Post-Event Resource Package

Age Equity Alliance 2024 Global Fall Forum

The Whole Life Career & Longevity Mindset Advantage
*The Leadership Imperative for Attracting,
Developing and Retaining All-Aged Talent*



Virtual Events

Americas, Europe, Asia Pac

October 15 - 17



Equipping Leaders With Insights to Thrive in a New Era of Workforce Dynamics

Sponsored by:



A Big Thank You!

Age Equity Alliance (AEA) is a US-based nonprofit working with companies to create best-in-class workplaces for employees across the age spectrum.

When we first began this educational event in 2022, our vision was to accomplish two things. Firstly, **we wanted to collaborate with other voices in this space**; and secondly, **we wanted to create a forum where leaders and advocates could deepen their awareness** of the multiple layers and complexities inherent in systemic ageism so that we can do even more to make the workplace more age-inclusive and age-equitable.

This year we lined up 24 speakers across the U.S., Europe, and Asia Pacific to speak on the many ways ageism impacts our lives and our workplace. That's the power of collaboration. After all, we are all in this "age thing" together!

A special thank you to all who contributed and participated in this year's event—especially our sponsors, David Allison, Founder and CEO of [Valuegraphics](#) and Wendi Barlow, Founder for [Barlow Consulting](#).



Of course, AEA wouldn't be where we are without having been incubated by [Old School—A Hub for Age Equity + Ageism Awareness](#) (formerly Old School Clearinghouse).

This resource package captures high-level takeaways from each session, includes contact information for each of the speakers, and provides many additional resources. **The event may be over, but the learning never stops!**

Sheila Callaham

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Executive Director

Age Equity Alliance

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Bobby Duffy

**Professor of Public Policy &
Director of the Policy Institute**

Professor Duffy is a renowned public policy expert and author with over 30 years of experience. He challenges societal understanding of generations, society, and human behavior through his research and books.

He has tackled nearly every major policy issue, even serving in the Prime Minister's Strategy Unit. Previously, he led public affairs and global research at Ipsos MORI and directed the Ipsos Social Research Institute, where he spearheaded the world's largest study on public perception.

[The Generation Myth: Why When You're Born Matters Less Than You Think](#)

[Why We're Wrong About Nearly Everything: A Theory of Human Misunderstanding](#)

Contact: bobby.duffy@kcl.ac.uk

[Connect with Bobby on LinkedIn](#)
[King's College London](#)

The Generation Myth

Top Takeaways

Generational Stereotypes Are Fueling Fake Generational Battles

Misleading stereotypes about generations distract us from more significant societal trends, especially on critical issues like climate change, where divisions are exaggerated.

Generational conflicts increase separation and stereotyping.

Gaps in attitudes are constant but natural. In 400 BC, Socrates wrote, "The children now love luxury; they have bad manners, they show disrespect for elders and love gossip in place of activity..." Proof that while differences in age attitudes exist, this gap has always been present.

Age separation is increasing: Rising physical and digital separation between generations contribute to stereotypes and weakens intergenerational connection, undermining both societal and workplace productivity.

Separation is bad in workplaces, one of the noisiest engines of age myths. This should be a place to connect!

Recommendations for Change

1. Ditch generational labels at work. Focus instead on meaningful collaboration & understanding life-stage differences.
2. Promote intergenerational interaction: implement age-inclusive recruitment, policies, and mentoring programs to foster connection and collaboration.
3. Evaluate and adapt initiatives: Continuously assess the effectiveness of initiatives, adapting them based on real-world feedback to strengthen understanding and workplace productivity.



Lin Shi

**Principal Actuarial Consultant
Mercer**

Lin has over 10 years of experience helping global organizations with their benefits strategies for employees across all ages in the workforce, with a focus on financial wellbeing.

Lin was the lead author for [Longevity Economy Principles: The Foundation for a Financially Resilient Future](#), a joint collaboration between Mercer and the World Economic Forum. The report emphasized the importance of creating a sustainable financial framework that accommodates longer lifespans.

Lin received a Fulbright-Schuman fellowship to study pension economics and labor force exit trends across the European Union, and was later honored as a Fulbright Ambassador.

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Longevity Economy Principles: The Foundation for a Financially Resilient Future

Top Takeaways

It takes all of us to design an age-inclusive world.

4 in 10 employers surveyed by Mercer do not include age in their DEli initiatives even though they acknowledge the importance of a longevity perspective.

Longevity work is about designing the future of work and that future is age-inclusive.

Case Study: Hyundai's Korean re-employment training demonstrates the effectiveness of public-private partnerships aligning training with business needs and social impact. A model with global transferability.

Promote Flexible Retirement and Career Pathways: Policies need to provide flexible options and later-life career growth opportunities, allowing employees to transition roles or responsibilities based on their life goals and needs.

Develop lifelong learning programs in partnership with governments and nonprofits and offer accessible upskilling opportunities to mid-career and older workers.

Provide holistic health benefits that promote well-being across all ages. Integrate financial literacy and retirement planning resources to help employees prepare for and navigate life stages effectively.

Pursue partnerships between government, private companies, and civil society to pool resources and create scalable solutions addressing workforce age inclusivity and supporting intergenerational engagement.



Andrew (Andy) Davis

Principal Consulting LLP's Health Care Practice, Deloitte

Andy has over 15 years experience as a leader in the health actuarial practice, driving change across the ecosystem with payers, providers, and life sciences companies. He brings an understanding of how to quantify the economic value of services to members, patients and customers.

Andy was the lead author for [How Employers Can Spark a Movement to Help us Live Longer and Healthier Lives](#).

Andy believes that employers have a growing responsibility to create a healthy and positive work environment and his research shows how viable that vision is. Those companies who embrace these initiatives can increase employee productivity and retention—and help improve the overall success of the business.

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How Employers Can Spark a Movement to Help us Live Longer and Healthier Lives

Top Takeaways

Employers can (and should) proactively empower and enhance employee well-being

Employers are starting to understand, acknowledge and embrace how they can get in front of and focus on employee wellness, prevention and healthy aging.

Lifestyle adjustments such as improved diet, physical activity, and quitting smoking, can dramatically extend healthy years—even when made later in life.

Personalized health coaching and medical guidance can prevent or manage genetic predispositions, as exemplified by Davis' personal experience with Alzheimer's risk.

Employers also have an opportunity to create inclusive health benefits addressing diverse employee needs across age, gender, race, and ethnicity.

By empowering proactive health measures, companies not only enhance employee well-being but also cultivate a more sustainable, resilient, productive longevity-ready workforce.

Employer Actions:

- Address access barriers by offering health-related transportation support and expanding telehealth.
- Extend healthcare access to include mental health, menopause support and other gender-specific needs to meet the varied needs of all employees.
- Invest in wellness programs that prioritize preventive health measures.
- Introduce or expand disease management programs to help employees manage chronic health conditions effectively.
- Recognize and address the health disparities among employee demographic groups.



Mona Mourshed
Founder and CEO, Generation

Mona has decades of experience as a leader in the education and workforce space, starting in the Middle East and expanding to countries across the world. She has authored widely cited reports and articles on education and workforce, and has more recently focused on social sector impact measurement. Prior to founding Generation, Mona founded and led McKinsey & Company's global education practice.

Generation trains and places all-aged workers into roles by growing relationships with employers around the world. Her research highlights the increasing need for policies and practices that support workers mid-career and older in skill development and career transitions and what both employees and employers must do to adapt and thrive in the future of work.

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The Mid-Career Opportunity: Meeting the Challenges of An Ageing Workforce

Top Takeaways

Pervasive Age Bias Continues in Hiring

Workers aged 45+ face significant challenges in job acquisition. About 40% of the long-term unemployed in the U.S. and Europe are aged 45+, with **age cited as the primary barrier by 60% of surveyed individuals** in this age group.

Employers often perceive older worker CVs as less “fit for purpose” despite 89% of these hires performing as well or better than younger peers. **This bias, rooted in concerns about adaptability and tech skills, remains a major barrier despite contrary evidence.**

One-third of 45+ workers participated in training in the last 3 years, compared to over half of younger workers, partly due to a belief that experience outweighs recent training. **However, those 45+ who did engage in upskilling were more successful in career transitions.**

Age biases intensify in the AI-integrated workplace, where older candidates are three times less likely to be considered for AI-utilizing roles.

Tips for For Workers 45+:

- Engage in relevant training and upskilling. Showing commitment to continuous learning can mitigate perception biases.
- Actively seek AI training and use cases to bridge the technology gap, positioning oneself as a digitally adaptive candidate.

Tips for Employers:

- Regularly review performance data across age groups to challenge internal biases.
- Diversify interview panels across age brackets to counteract age-related hiring biases and ensure fair assessments.
- Identify proficient older employees using AI and position them as workplace champions. They can set an example for other workers.



Ashton Applewhite
Age Activist & Author



Lin Shi
Principal Consultant, Mercer



Andrew (Andy) Davis
Principal Consultant, Deloitte



Mona Mourshed
Founder & CEO, Generation

Panel Discussion facilitated by: **Ashton Applewhite** Age Activist, Author, Ted Speaker

The author of *This Chair Rocks: A Manifesto Against Ageism*, Ashton is at the forefront of the movement for age equity.

In 2022 the United Nations named Ashton as one of the *Healthy Aging 50*: 50 leaders transforming the world to be a better place to grow older. She has addressed the US Congress and the UK and Australian parliaments on the importance of needed legislation to protect elders against age discrimination.

Ashton is also co-founded for Old School—a hub for age equity + ageism awareness and is Director Emeritus on the AEA Board.

Buy Ashton's Book—[This Chair Rocks: A Manifesto Against Ageism](#)

[Visit Old School](#)

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PANEL DISCUSSION: WHEN THE RUBBER HITS THE ROAD

Top Takeaways

Breaking Age Barriers Helps All Ages

Ashton: Lin, what role should employers play in helping employees achieve financial well-being?

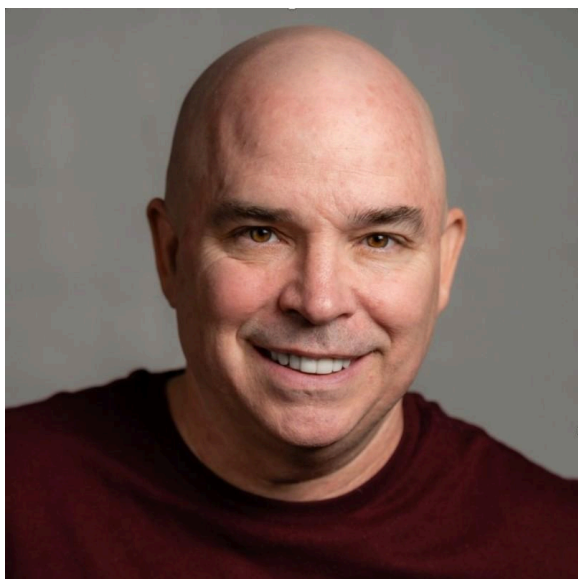
Lin: Employers play a crucial role, especially as we're seeing the burden of financial well-being placed largely on individuals. While personal financial literacy is helpful, it's really about creating systems that set employees up for success, i.e., comprehensive financial well-being programs, financial coaching, and access to advisory services, which alleviate financial stress and enhance productivity.

Ashton: Andrew, you talk about the distinction between lifespan and healthspan and the need for tailored health solutions in workplaces. Can you share your thoughts on how employers can support health equity across different groups?

Andrew: Health needs vary significantly, so a one-size-fits-all approach doesn't work, especially when addressing age, gender, or racial disparities. Employers are beginning to recognize the importance of offering a portfolio of options in health and wellness programs. This can include flexible mental health resources and customized support—crucial for building inclusive and productive workplaces.

Ashton: Mona, when you started Generation, it focused on young talent. Now, it supports people across all ages. Can you share why this shift is so important and what you've learned about ageism across the lifespan?

Mona: We started Generation for young workers facing high unemployment, but soon realized that people in their mid and late careers were also struggling to find work. Ageism affects all ages, so addressing it isn't just about helping older workers; it's about creating opportunities across the age spectrum. Employers need to see the value that experienced workers bring, which is often overlooked.



Eddie Prentiss
Executive Creative Director,
Stratacomm

Eddie leads the creative department and creative teams across multiple disciplines for Stratacomm. This includes all of the creative work the agency produces.

He is the founder of [Brainco](#), one of the top schools for advertising and design students in the country, as recognized by Creativity Magazine. Eddie is also the Founder for [CreAGELESS](#), a community for professionals over 40.

WHERE IN THE MEDIA?

- LITERATURE
- MOVIES
- NEWS
- THEATRE
- SOCIAL MEDIA
- ADVERTISING

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Addressing Ageism in Media

Top Takeaways

Celebrating Strength and Stories at Every Age

The Facts

- Older adults are often either ignored or misrepresented in the media. This narrow depiction can reinforce societal stereotypes, casting older adults as less capable or valuable than younger people, even though they represent a diverse, growing demographic.
- Advertising frequently targets younger audiences with the intent of creating lifelong brand loyalty, while overlooking the purchasing power and brand loyalty of older generations.
- Regardless of age, people experience similar fears related to career security, identity, and financial stability. However, fear manifests differently across generations: younger adults worry about achieving career stability, while older adults fear job loss and the potential for financial insecurity in later life.
- By building intergenerational workforces and communities, individuals across age groups can share knowledge, support each other, and help dispel stereotypes.
- Younger and older individuals can both contribute unique insights, fostering a more inclusive and supportive environment.
- Engaging influencers of all ages can help brands connect authentically with a wider demographic, bridging the gap in traditional advertisements.

What to Do

- Conducting age awareness and training within media & advertising can mitigate biases and create a more inclusive portrayal across media platforms.
- Continuing to call out ageist media is an excellent way to hold brands, and their advertising companies, accountable for change.



Janine Vanderburg

CEO, Encore Roadmap

As CEO of Encore Roadmap, Janine has over 30 years of experience in social and organizational change. She now focuses on speaking, writing, and consulting.

Janine educates employers about the business case for older workers and intergenerational teams, while advocating for age-inclusive policies.

She co-founded *Changing the Narrative* in 2018 to address ageism, deploying her social change experience gained from over 3 decades of consulting with leading change makers across the U.S. In 2019 Janine launched its award-winning Age-Friendly Workplace Initiative. *Changing the Narrative* received the 2024 American Society on Aging's Award for Success in Diminishing Ageism.

Janine's work has earned her numerous awards including Top 25 Powerful Women in Business by Colorado Women's Chamber of Commerce and the American Society on Aging's 2024 Award for Success in Diminishing Ageism.

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Tear Down This (Generational) Chart!

Top Takeaways

Disrupt Ageism to Unify the Workplace

Janine's three most compelling arguments for tearing up the generational chart:

- 1. Generational Charts Reinforce Age Stereotyping:**
Grouping people by age into generational stereotypes is a form of ageism, attributing broad characteristics to individuals solely based on birth year. By tearing up these charts, workplaces can foster more accurate, respectful, and inclusive views of employees.
- 2. Age Divisions Distract from Shared Needs and Goals:**
Research shows people of all ages generally want similar things in the workplace— fair pay, flexibility, and good leadership. Generational charts, however, obscure these shared needs and reinforce assumed “differences.”. By focusing on common ground, employers can better support all employees.
- 3. Generational Thinking Impedes the Benefits of Age-Inclusive, Intergenerational Teams:** Mixed-age teams bring proven advantages like increased creativity, productivity, and innovation. By discarding generational charts, workplaces can prioritize building balanced, age-diverse teams that harness the strengths of all age groups, enhancing collaboration and performance.

Calls to Action

- 1. Challenge Stereotypes:** Encourage team activities that confront age-related assumptions and showcase real, diverse examples of achievement across ages.
- 2. Proactively Identify Common Ground:** Engage teams in finding common values and goals to promote collaboration over division.
- 3. Amplify Bright Spots:** Recognize and celebrate intergenerational success stories within the organization as models to follow.



Megan Dean
Founder, HireUp

**Legal Discussion:
How Companies
Can Reduce
Workplace Ageism**



Mahir Nisar, Principal
Nisar Law Group, P.C.



Peter Romer-Friedman
Founder, PRF Law

Megan Dean is the founder of HireUp and together with its sister company HREdge, is a recruiting powerhouse. She is also a Director on the AEA Board.

Mahir Nisar is Principal at the Nisar Law Group, P.C., a boutique employment litigation firm dedicated to representing employees who have experienced discrimination within the workplace.

Peter Romer-Friedman is the Founder of PRF Law. He is dedicated to bringing legal actions against companies and governments to get justice for clients, stop harmful practices, reform policies, shape the law, and make lasting change.



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Legal Panel: How to Reduce Workplace Ageism

Top Takeaways

Age-Diverse Employees Drive Growth, Reduce Legal Risks

Legal Risks of Age Discrimination: Both attorneys stressed that employers face significant legal risks, including EEOC complaints, individual and class action lawsuits, if they don't monitor and address age-based discrimination in hiring, employment, training, development, promotions, and termination practices.

Impact on Employee Well-being: Mahir noted the psychological toll of ageism on employees, as it affects self-confidence, self-worth, and sense of inclusion. He stressed the need for company vigilance for ensuring equal opportunity and addressing ageism transparently.

Growing Age Discrimination in Digital Hiring: Peter cited the increased use of digital tools that may screen out older candidates. Large companies often employ age-biased recruitment tactics, such as limiting job listings to "recent graduates," which they think masks discriminatory hiring.

Inequities Across Employment Lifecycle: Ageism is especially pervasive during hiring and layoffs, with older workers often seen as expendable. Both attorneys suggested that alternative work arrangements, such as part-time transitions, could benefit both employers and employees by reducing costs while preserving experience.

Employee Benefits: Both attorneys discussed benefits, such as fertility treatment or student loan assistance, that can sometimes be inadvertently age-biased. Employers are encouraged to ensure benefits cater to diverse life stages and family structures.

Policy and Training Gaps: The panel advocated for age to be included in DEI (diversity, equity, and inclusion) training. This can foster awareness and help prevent age-biased language and behavior, which often stems from a lack of understanding and sensitivity.



Sydney Barcus

Co-founder, Barcus Performance Solutions
Member, AEA Board of Directors

Sydney is a recognized expert in organizational transformation with a PhD in Industrial and Organizational Psychology. She's held various executive roles in Fortune 500 companies, facilitating strategic and sustainable change in Manufacturing, Energy, Transportation, Healthcare, Retail, and Hospitality.

Sydney is AEA's lead for the Longevity Mindset Index (LMI), an employee measurement tool that provides a temperature check for organizational talent sustainability across the age spectrum.



The LMI relies on five indicators to measure longevity readiness: 1) Age at Work 2) Work Culture 3) Ongoing Development, Upskilling & Reskilling 4) Pursuit of Purpose & Passion 5) Financial Literacy & Security.

LMI results provide leaders with key insights and next steps on how to retain all-aged talent in an increasingly tightening labor market.

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Age Equity Alliance: Longevity Mindset Index™

Top Takeaways

Measure Talent Sustainability for All Ages With the Longevity Mindset Index™

Key Components of the LMI

1. **Purpose:** The LMI tool was created to scientifically measure the longevity mindset within organizations, recognizing that changes in age-inclusive practices must be based on measurable insights.
2. **Employee Perception:** A unique aspect of this assessment is its focus on gathering employee perceptions about age inclusivity, recognizing that an organization must understand employees' views to implement effective change.
3. **Scientific Rigor:** The LMI tool aims to go beyond a basic survey by using statistical methods (e.g., Cronbach's Alpha, using SPSS software) to ensure validity and reliability, meaning it accurately and consistently measures organizational longevity mindset.
4. **Future Impact:** As data accumulates, the tool could establish international baseline metrics for age inclusivity. Long-term goals include drawing correlations between high LMI scores and positive organizational outcomes like talent attraction, innovation, and efficiency.

Calls to Action

1. **Beta Invitation:** AEA seeks several hundred respondents across various company sizes and industries to validate the LMI accuracy. Companies interested in age inclusivity and talent sustainability are encouraged to participate.
2. **Data Collection for Longevity:** As data is collected, the tool's scientific foundation will strengthen, ultimately building longitudinal insights on age equity's impact on business.
3. **Advocacy for Age Inclusivity:** LMI highlights the need for companies to foster inclusive workplaces across all ages, leveraging underutilized talent and countering ageism to remain competitive.



David Allison

Founder and CEO, Valuegraphics

As a human values expert, international speaker, and two-time best-selling author, David has reshaped how we understand ourselves and those around us.

The Valuegraphics Project is the first global inventory of core human values—and transformed those values into measurable data, giving us powerful human-centric insights. His groundbreaking work is featured in college textbooks around the world and has appeared in major media.

His book, *The Death of Demographics: Valuegraphic Marketing for a Values-Driven World*, is a must-read for anyone looking to genuinely connect with others.

[Grab the book!](#)

[Link to Valuegraphics](#)

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How Values Will Shape the Future of Work

Top Takeaways

People's Actions and Decisions Are Universally Driven by Values—Not Demographics

A transformative view on human behavior...

Values as Universal Drivers: People worldwide are fundamentally driven by their core values, not by demographic labels. Our brains are wired to make choices based on value alignment, which sparks neurological rewards like dopamine.

Demographic Stereotyping is Misleading:

Demographic-based categorization (age, gender, ethnicity) is not only ineffective but also reinforces stereotypes and fuels discrimination. Valuegraphics data shows that demographic groups show only about 10.5% similarity, while value-based groups show nearly 89% similarity—proof that values are far more indicative of behaviors.

Building Values-Based Workplaces: Values-based approaches in leadership, employee engagement, and recruitment can create more meaningful, effective organizations. Focusing on values, rather than age or other demographics, enables organizations to foster a truly diverse and collaborative work force.

Behavioral Science & Decision-Making: **Values are age-agnostic and should be central in workplace design, recruitment, and cultural strategy to support authentic engagement and retention.**

Values Diversity Over Demographic Diversity: Real diversity arises from values diversity, not merely demographic markers. Teams should prioritize values diversity to encourage innovation through varied perspectives, rather than relying on superficial demographic differences.

A powerful shift in perspective: Treat people based on values rather than demographic labels to foster unity and combat systemic bias.



Daniel Jolles

Researcher, The Inclusion Initiative
London School of Economics

Daniel Jolles' research focuses on applying behavioural science to questions of generations, age-diversity, and the ageing workforce. He has been published in international scientific journals and aims to help organisations proactively create productive and inclusive multigenerational work cultures.

Daniel's latest research focuses on the new age of talent and retirement. He critiques key 'retirement myths' and demonstrates how leaders can invest to secure the best talent while also improving employee health, wellbeing, and longevity.

Daniel advocates a fundamental shift in workplace policies—retiring traditional views on age and career progression, essential for maximizing both employee potential and organizational success. Daniel has contributed to AEA since its inception and currently serves as an academic advisor.

Some of Daniel's research is in the appendix.

[Link to LSE's The Inclusion Initiative](#)

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A New Age of Talent: Leading Beyond the 'Retirement Myths'

Top Takeaways

Embrace Flexibility and Redefine Age in Careers

Debunking myths around talent, cognitive decline, and early retirement, by reframing retirement, which includes expanding job flexibility, considering retirement sabbaticals, and anticipating the potential influence of universal basic income.

Challenge the Younger Talent Myth. Organizations must tap into the skills and experience of all aged workers, especially given that older talent pools are growing faster than younger ones.

Reframe Cognitive Decline Narratives: Common misconceptions about cognitive decline do not acknowledge that crystallized intelligence improves with age (knowledge and experience), while declines in fluid intelligence are gradual and often insignificant.

Debunk the ROI Fallacy on Hiring Older Workers: The notion that older workers offer less ROI is wrong, considering that they often stay in roles longer, thus providing stability and continuity.

Move Beyond Early Retirement Stereotypes: The traditional view that success equates to early retirement yet ignores research that shows older workers often maintain ambitious career goals and that meaningful work can be beneficial for longevity.

👉 Broaden hiring practices to recognize skills across all ages and reduce age bias in recruitment.

👉 Educate leaders and employees about the diverse cognitive strengths across age groups, advocating for continuous learning and challenging roles at all career stages.



Shruti Singh

Senior Economist, OECD

Shruti joined the OECD in 2007 as an economist and has led and co-authored several landmark reports in the area of disability, mental health and work policies.

She has also written extensively on a wide range of labour market policy issues including Active Labour Market Policies and Displaced Workers policies aimed at labour-market reintegration of the unemployed.

In this session, Shruti covered highlights from “The Mid-Career Opportunity: Meeting the Challenges of An Ageing Workforce,” a collaboration between Generation and the OECD.

The report shows the increasing need for policies and practices that support mid-career workers in skill development and career transitions and actionable strategies for organizations to adapt and thrive amidst demographic shifts.

[View the Report](#)

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The Mid-Career Opportunity: Meeting the Challenges of An Ageing Workforce

Top Takeaways

The Traps of Job Mobility Are Many

Key challenges and actionable insights to address barriers and engage older workers.

Key Messages

Longevity as an Opportunity and Challenge: Aging populations reflect positive developments in healthcare and living standards, yet add pressure to labor and fiscal systems, especially in countries where the old-age dependency ratio continues to rise.

Job Flexibility and Mobility Decline with Age: Career mobility drastically drops after 40, leading to a stagnation. This lack of mobility limits job satisfaction and economic adaptability.

Age as a Barrier: Nearly 40% of workers aged 45–65 reported age as the primary barrier to new jobs.

Value of Lifelong Learning: Employers are as likely to consider hiring someone with 5 years experience as they are someone with 20 years experience. The takeaway? Ongoing training is essential for all ages wanting to shift roles.

Calls to Action

Individuals can proactively seek certifications and job-relevant training to enhance adaptability.

Employers can develop age-inclusive policies that recognize the capabilities and potential of older workers.

Policymakers can write and pass supportive legislation to facilitate job mobility and accountability for all ages.



Graham Pearce

Principal, Mercer

Graham is a principal consultant with Mercer's Multinational Client Group providing strategic advice and project and relationship management to multinationals.

He is also the Global Defined Benefit Segment Leader helping multinationals manage their people, reward, and benefit plan strategies, systems, and other issues outside the home country and with topics that cross international boundaries.

In this session, Graham delved into the economic opportunities presented by an ageing population and explored the key principles for building financial resilience and leveraging the longevity economy.

[View the Report](#)

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Longevity Economy Principles: The Foundation for a Financially Resilient Future

Top Takeaways

Building Resilience for Longer Lives Key Insights from Mercer's Longevity Talk

Key Takeaways

Shift from Linear Careers to Adaptive Longevity

Planning: Traditional career-retirement structures are outdated. Pearce highlighted the need for flexible career paths and continual skill-building to adapt to longer working lives.

Inequalities in Longevity: There are significant disparities in life expectancy and health outcomes based on income, with wealthier retirees outliving poorer ones by notable margins. This impacts public health and social support structures.

Longevity Economy Principles: Six guiding principles:

1. Ensuring financial resilience across life stages.
2. Promoting universal financial education, ideally through public-private partnerships.
3. Supporting healthy aging to extend workability.
4. Prioritizing lifelong skills training and adaptable jobs.
5. Designing support systems to address loneliness and foster intergenerational connections.
6. Addressing structural inequities across gender, race, and income levels.

Employer's Role in Longevity Resilience: Pearce emphasized the importance of employers providing benefits that support financial, health, and social well-being, such as retirement savings, health screenings, and mental health programs. Employers are urged to foster inclusive work environments that accommodate caregiving and help older workers reintegrate.



Claire Farwell

Founder, AI Claire

AI Claire, is a renowned AI educator and strategist, leveraging her extensive experience across industries to demystify AI for companies worldwide.

Fluent in four languages and having worked in 20+ countries, Claire brings a global perspective and a deep understanding of cross-cultural practices. Her company is at the forefront of making AI accessible and engaging for all, bridging the gap between the technical and non-technical of all ages.

In this session, Claire shared insights on AI's potential as a supportive tool in the workplace, emphasizing that AI is a catalyst for personal growth and productivity rather than a replacement for human jobs. Claire emphasized how AI can enable career longevity through skill adaptability and personalized learning.

"AI is not here to take over; it is here to support you." Embrace AI as a friend, remain curious, and view change as an opportunity to evolve in this rapidly advancing era."

[Visit AIClaire website](#)

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AI and Longevity

Crafting Careers that Stand the Test of Time

Top Takeaways

Unlock Career Growth: How AI Can Transform Skills and Boost Productivity For All Ages

Key Takeaways

1. **AI is a Supportive Tool:** AI should be viewed as an empowering assistant, reducing mundane tasks (like email management or data entry) to free up time for more innovative and creative endeavors. Think of AI as a "work ally" that complements human skills.
2. **Personalized and Continuous Learning:** AI can support personalized upskilling and learning paths tailored to individuals. AI makes lifelong learning more accessible, supporting ongoing skill development and job relevance.
3. **Growth Mindset:** A growth mindset and adaptability are essential. Personal branding and networking can drive competition, especially on platforms like LinkedIn, where personal branding and recruiter visibility are vital.
4. **Practical AI Tools:** AI to simplify and boost productivity:
 - **ChatGPT** for brainstorming and career planning
 - **Notion** for organization and task management
 - **Otter AI** for meeting notes and summaries
 - **Descript** for easy video editing and content creation
 - **Gamma** for quick, AI-generated presentation slides
5. **Career Longevity and AI's Impact on Jobs:** AI is expected to create millions of jobs globally. Upskilling enables employees to transition to more rewarding roles, as seen in manufacturing and customer service. AI-driven careers, such as data translators and ethics advisors, provide new opportunities across industries.

Calls to Action

- Try one AI tool and assess the productivity benefits before integrating more.
- Use AI-driven learning tools to structure a personalized learning journey.
- Embrace AI with an open mind. Continuous learning and adaptability are key to thriving.



Claudia Vaccarone

Advisor for Inclusion, Gender and Diversity in Media

Claudia has 20+ years of international experience in media, tech and broadcasting. She advises companies worldwide how to develop inclusive cultures.

She also trains newsrooms on inclusive communications, creative executives and marketing teams on un-stereotyped portrayal. She is the author of the 2019 [All Things Being Equal Guidelines report](#). She has worked with Netflix, the EBU, Swissinfo on award winning projects.

Her presentation highlighted the pervasive issue of gendered ageism in media. She emphasized using data to hold the industry accountable.

Claudia's message was a call to address ageism in media and create a more inclusive industry reflecting the diversity of all ages.

NO PROGRESS FOR GIRLS & WOMEN ON SCREEN
Prevalence of girls and women as speaking characters across 1,700 films, in percentages



Contact Claudia: cvaccarone1@gmail.com
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Media's Role in Redefining Age Perceptions

Top Takeaways

How Ageism in Media Silences Older Women

Key Takeaways

Media as a Distorted Mirror: Media often projects a male-dominated and youth-glorifying view of society. This distorted reflection has marginalized older women, shaping societal norms that prioritize beauty, youth, and perfection.

Systematic Erasure and Stereotyping: Research from AARP, the Gina Davis Institute, and the USC Annenberg Inclusion Initiative underscores that women 50+ are vastly underrepresented in media. In top films only a small percentage of older characters are women and they're frequently shown in negative, stereotypical roles (e.g., senile or frumpy). Women comprise over half the population but occupy fewer than 25% of media for ages 50 and up.

Advertising's Role in Anti-Aging Rhetoric: Adverts targeting youth and anti-aging products uphold a damaging standard that equates aging with failure. This pressure to stay young is internalized, as seen in the global anti-aging industry worth billions.

Lack of Female Representation Behind the Camera: Gender disparity persists not only onscreen but also behind the camera, with women occupying a small percentage of key creative roles in media. The average creative director is 30 years old and male.

Impact on Younger Generations: Obsession with youth has extended to younger audiences, creating unrealistic standards that contribute to mental health issues and increased pressure for cosmetic changes.

Encouraging Trends and Changing Narratives:

Initiatives like Channel 4's Diversity in Advertising Award promote age diversity, encouraging brands to showcase a broader spectrum of aging experiences.



Ana Coura

Student Researcher Age Equity Alliance

Ana is a Brazilian psychology student completing her bachelor's degree at the University of Trás-os-Montes e Alto Douro in Portugal. She is fascinated by psychometrics and psychological assessment in adult development.

As an AEA volunteer, Ana supports research efforts, assists with translations, and develops podcasts to amplify messaging.

To offset the decreasing talent pipeline, leaders must pivot policies, procedures, and workplace culture to facilitate the new “whole life career” model and to benefit from a longevity mindset advantage. Ana introduced Age Equity Alliance’s new Longevity Mindset Index (LMI) and how it can give leaders insights they need to ensure talent sustainability today and in the future.

[Contact Us to Learn More!](#)

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Age Equity Alliance: Longevity Mindset Index™

Top Takeaways

Transforming Workplace Culture for All Ages

Key Takeaways

Longevity Mindset Advantage for All Ages: Longevity mindset isn't just for older workers; it supports workers of all ages. This inclusive approach fosters a more engaged, holistic, and sustainable workplace.

The Longevity Mindset Index™ (LMI): Assesses workplace longevity mindset by measuring employee perceptions and identifying ways for companies to support continuous talent sustainability. It incorporates quantitative/ qualitative data to provide vital insights.

Assessment Development Process: Focuses on essential workplace aspects, including long-term employee development, financial acumen, and organizational support. The tool uses closed-ended questions for easy quantification and analysis and open-ended questions to provide context and depth. Rigorous development and expert validation will ensure scientific reliability and relevance.

Data Collection and Validation: The LMI is in its initial data collection phase, with the team prioritizing scientific rigor to validate its effectiveness. Using statistical analyses like Cronbach's Alpha, the LMI aims to transition from a simple survey to a robust scientific assessment tool.

The Goal? Help leaders develop policies and a culture that align with a whole-life career model, benefiting both the workforce and the organization.

AEA is seeking companies to beta test the LMI tool. Up to 500 responses at no cost!

Longevity Mindset as a Business Strategy: Employers are encouraged to adopt a longevity mindset as part of their business strategy, supporting a sustainable, committed workforce across the age spectrum.



Vânia de la Fuente-Núñez

Global Consultant

Vânia is a medical doctor, anthropologist, and public health expert with over a decade of dedicated experience in addressing critical global issues, particularly focusing on ageing and combatting ageism.

Vânia has worked with international organizations, government agencies, research institutions, NGOs, and the private sector, and has demonstrated expertise in navigating complex challenges and opportunities related not only to ageing but also to epidemics and outbreaks, and health research, and development.

Vânia just released her book, *La trampa de la edad: Cómo los estereotipos edadistas nos perjudican en todas las etapas de la vida* (No ficción)

[Grab Vânia's book!](#)

English translation: The age trap: How ageist stereotypes harm us at all stages of life (Nonfiction)
Not currently available in English.

Contact: vaniadelafuente@outlook.es

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Unlocking Potential

The Power of Age

Diversity in the Workplace

Top Takeaways

Unlock Age Diversity

The Key to Solving Today's Talent Shortage

Key Takeaways

Global Talent Shortage Paradox: Despite a shrinking labor pool, age discrimination persists, with both younger and older workers disproportionately affected. This results in talent underutilization, thus contributing to the talent shortage.

Root Causes of Talent Shortage:

- Demographic shifts are reducing the working-age population, increasing pressure on younger and older workers.
- Lack of employer readiness to attract and retain young and older talent, coupled with pervasive ageism, limits opportunities for both age groups.
- Educational systems are not aligned with current workforce demands, limiting the availability of job-ready talent.

Value of Age Diversity: Age-diverse workforces enhance innovation, productivity, and save money. Companies that embrace age diversity can reduce turnover costs and increase productivity.

Three M's for an Age-Inclusive Workforce:

- **Mobilizing:** Attract and retain talent across ages by eliminating age bias and fostering inclusion.
- **Maintaining:** Support employee well-being and work-life balance with flexible work options, phased retirement, and wellness program options.
- **Maximizing:** Invest in lifelong learning and cross-age mentoring to maintain a skilled and engaged workforce.



Ee-Ke Chew

Board Director, NTL Institute for Applied Behavioural Science

He is an HR leader with extensive business and management experiences, a practiced coach and an expert practitioner of organization development and behaviour.

The NTL Institute for Applied Behavioral Science is a 75-year old nonprofit with a mission to advance applied behavioral science in the service of social justice, oppression-free societies, and healthy individuals, groups, and organizations in the world.

In this presentation, Ee-Ke advocates for the recognition of the interdependence when tackling age equity and encourages daily, incremental improvements as the foundation of long-lasting change.

[Visit the NTL Institute](#)

Contact Ee-Ke: eeke@leadhcd.com
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A Collective Approach to Integrating Older Workers

Top Takeaways

Collective Impact Drives Change

Key Messages

1. **Collective Responsibility:** Ageism and other social challenges can't be solved by individual efforts alone. Both societal and individual responsibilities are crucial. Older individuals need to remain active and relevant through lifelong learning, embracing humility and continuous contribution, and society should create roles that leverage their experience.
2. **Individualism vs. Collectivism:** Tension between individualistic & collectivist cultures, and global trends in individualism, slows progress. Addressing complex social issues requires a collective mindset.
3. **Challenges:** Competition for resources, group dynamics, and unrealistic expectations add to the difficulties in achieving collective impact.
4. **Conditions for Success in Collective Impact:**
 - **Common Agenda:** Clear, shared objectives.
 - **Measurement:** Consistent accountability metrics.
 - **Reinforce Activities:** Align actions across groups.
 - **Continuous Communication:** Regular, transparent updates to maintain alignment.
 - **Support:** Dedicated organizations or staff.
5. **Long-term Perspective on Change:** Systemic issues, like age equity and social justice, require gradual improvement. Viral change, achieved by spreading awareness and creating advocates, is essential for sustained impact.

Actions

1. Promote Lifelong Learning
2. Engage in Collective Efforts
3. Support Age Equity Advocacy



Abby Bloom

Co-Founder, PrimeLife Partners

PrimeLife Partners is dedicated to accelerating innovation, investment, and commercialisation for longevity and care.

Its unique combination of services, products, and initiatives is designed to catalyse and foster social impact through sustainable innovation in Australia and globally.

PrimeLife is dedicated to transforming how we age, live, care, and retire by building and advocating for a resilient Longevity Economy ecosystem.

Who is an *Intergenerational Worker*?

- Any employee working while caring for more than 1 generation
- 12-20+% of the average workforce
- Not simply "The Sandwich Generation"
- More likely to be a woman (care is gendered)

[Visit PrimeLife Partners](#)

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Building an Ecosystem for Workplace Longevity

Top Takeaways

Is Your Workplace Ready for Whole Life Workers of All Ages?

Key Messages

1. **Intergenerational Employee Perspective:** Employees are working while managing caregiving responsibilities across multiple generations, often referred to as the "sandwich generation."
2. **Longevity Ecosystem:** Organizations need to support employees who are juggling work care responsibilities for both younger and older.
3. **Demographic Shifts:** Employers must adapt to an aging population, which will see more people aged 65+ than young adults in many countries.
4. **Commercial & Social Value:** Recognizing economic & social benefits for supporting intergenerational workers will benefit the company with increased productivity, loyalty, and organizational success.
5. **Innovation and Flexibility:** Particularly for employees balancing caregiving, flexible hours, location choices, and paid leave for elder care mirror the support extended to new parents.

Calls to Action

1. **Shift the Frame of Reference:** Implement policies and benefits for all employees providing care.
2. **Invest in Longevity Ecosystems:** Offer resources that align with caregiving responsibilities.
3. **Enhance Organizational Accountability:** Integrate KPIs that measure support for all-aged workers.
4. **Address "Care Washing":** Avoid superficial claims of caregiving support (termed "care washing").
5. **Safe Disclosure:** Encourage safe environments where employees can openly communicate their caregiving responsibilities without fear.



Catherine Gagné

Regional Consulting Leader
Mercer, Hong Kong

Catherine has nearly 20 years' experience in delivering professional services, in particular working with C-suite HR to develop long term strategic direction for their employee benefit plans.

She has worked in Hong Kong, the United States and Canada where she was involved in delivering projects bridging various practices including Health and Risk, Retirement, Technology, Compensation, Diversity and Inclusion and Communication.

Catherine's presentation highlighted the collaborative study by Mercer and the World Economic Forum, focusing on the "longevity economy" and how age inclusivity can address long-term demographic challenges globally.

The report's premise is to create a sustainable and realistic approach to aging, considering life expectancy projections that could affect workforce dynamics, health care, and social systems for decades.

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Longevity Economy Principles: The Foundation for a Financially Resilient Future

Top Takeaways

How age-inclusive strategies drive economic growth and social equity

Key Messages

1. **Six Guiding Principles for Age Inclusivity:** The report establishes six principles to tackle the challenges posed by aging populations, emphasizing financial resilience, healthy aging, skill development, intergenerational connectivity, and inclusivity. These principles urge stakeholders—individuals, employers, governments, and communities—to collaborate and integrate these values to promote an age-inclusive society.
2. **Financial and Health Equity:** Supporting health care and financial security is critical, particularly as people live longer. A gender lens reveals additional obstacles for women who often have less retirement savings due to career breaks and caregiving responsibilities.

Calls to Action

- **Promote Multi-Stakeholder Collaboration:** It is key to create partnerships among governments, employers, and communities to address ageism holistically, integrate older workers, and foster environments that support lifelong financial resilience, health, and learning.
- **Encourage Inclusive Workforce Policies:** Employers are urged to prioritize inclusive hiring practices, flexible work arrangements, and age-appropriate work conditions to better utilize the skills of an ageing workforce.
- **Health and Well-being for All Ages:** Policies must emphasize health equity, addressing both access to health care and support for chronic conditions, especially as aging increases health risks.



Sydney Barcus, Co-founder
Barcus Performance Solutions
Member, AEA Board of Directors



Ana Coura
Student Researcher
Age Equity Alliance

Sydney is a recognized expert in organizational transformation with a PhD in Industrial and Organizational Psychology. She's held various executive roles in Fortune 500 companies, facilitating strategic and sustainable change.

Ana is a Brazilian psychology student completing her bachelor's degree at the University of Trás-os-Montes e Alto Douro in Portugal. She is fascinated by psychometrics and psychological assessment in adult development.

To offset the decreasing talent pipeline, leaders must pivot policies, procedures, and workplace culture to facilitate the new “whole life career” model and to benefit from a longevity mindset advantage. Ana and Sydney presented the Longevity Mindset Index (LMI) and how it can give leaders insights they need to ensure talent sustainability today and in the future.

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[Contact Us to Learn More!](#)

Age Equity Alliance: Longevity Mindset Index™

Top Takeaways

Is Your Workplace Longevity Ready?

Key Messages

1. The Longevity Mindset Index™ (LMI) provides employers with an assessment of how well they support employees of all ages. The tool provides insights into areas like continuous learning, financial security, and inclusivity across the age spectrum. Employee insights better enable companies to align strategies with workforce expectations, driving sustainable, long-term change.
2. The LMI was meticulously crafted through rigorous research, with input from experts and continuous validation steps to ensure relevance and accuracy. The tool includes quantitative and qualitative elements to capture a holistic view of employees' experiences, ensuring it provides actionable insights.

Beta Testing and Next Steps: AEA seeks organizations to pilot the LMI. The data collected will help refine the tool for reliable, scientifically valid results that organizations can use to strategize improvements.

Call to Action

Organizations interested in advancing age equity are invited to connect with AEA to explore how the LMI can enhance workforce inclusivity and retention.





David Tarr

CEO and Founder, Maturious

Maturious has a bold mission to eliminate ageism and bias in hiring practices and create equal employment opportunities for mature-age workers.

David's vision is simple yet powerful—employment should be based on merit, not outdated perceptions about age.

Maturious was born out of the realisation that businesses are facing a recurring challenge: talent gaps are widening, and the traditional pools they've relied on are shrinking. Company leaders are recognising the need for more objective and efficient recruitment practices. But more importantly, they are beginning to expand their definition of what talent really means.

Contact David: [David@](mailto:David@Maturious.com)

[Connect with David on LinkedIn](#)

Ensuring Talent Thrives Strategies for Sustainable Workforces

Top Takeaways

Ignoring Age Diversity Could Cost Your Business Its Competitive Edge

Key Messages







1. **Ageism as a Success Barrier:** Ageism prevents employers from accessing skilled, loyal, and innovative mature age talent. **Businesses that fail to adapt risk falling behind.**
2. **Demographic Realities:** With people living longer, a significant portion of the workforce will be over 50 by 2050. Ignoring mature workers means missing out on a \$22 trillion longevity economy, which brings new opportunities across sectors.
3. **Value of Mature Talent:** Older workers' crystallized intelligence, deep expertise, and decision-making skills are honed from decades of experience.
4. **Flexible Work Environments and Health:** Flexibility is essential to retain older workers. Early conversations about healthy aging and flexibility in job roles foster a more inclusive culture.
5. **Data-Driven Age Inclusivity:** Tarr highlights the importance of removing age-based barriers in hiring, such as over-reliance on applicant tracking systems and inflated degree requirements.
6. **Redefining Careers and Continuous Upskilling:** **The 40-year career model is outdated.** What's in are longer, non-linear career paths that allow for breaks and upskilling and support workers who may switch roles or take time for caregiving.

Calls to Action


- Integrate Age-Inclusive Practices.
- Embed age inclusivity into DEI and ESG strategies.
- Track and report on recruitment, retention, and development of mature age workers.
- Adapt Hiring and Training by removing barriers, promoting flexible work policies, and offering continuous learning opportunities for all.
- Celebrate Age Diversity.
- Challenge Ageism.

APPENDIX





RESEARCH & REPORTS

	<u>Longevity Economy Principles: The Foundation for a Financially Resilient Future</u>
	<u>How Employers Can Spark a Movement to Help us Live Longer and Healthier Lives</u>
	<u>The Mid-Career Opportunity: Meeting the Challenges of an Ageing Workforce</u>
	<u>Age-Proofing AI: Enabling an intergenerational workforce to benefit from AI</u>
APA PsycNet[®] Daniel Jolles, Ph.D	<u>Who will I be when I retire? The role of organizational commitment, group memberships and retirement transition framing on older worker's anticipated identity change in retirement</u>
APA PsycNet[®] Daniel Jolles, Ph.D	<u>Too Old to Be a Diversity Hire: Choice Bundling Shown to Increase Gender-Diverse Hiring Decisions Fails to Increase Age Diversity</u>
	<u>How employers can unlock the potential of the longevity economy</u>
	<u>Living Longer, Better: Understanding Longevity</u>





BOOKS

Bobby Duffy, Professor of Public Policy & Director of the Policy Institute	<u>The Generation Myth: Why When You're Born Matters Less Than You Think</u>
Bobby Duffy, Professor of Public Policy & Director of the Policy Institute	<u>Why We're Wrong About Nearly Everything: A Theory of Human Misunderstanding</u>
	<u>The Death of Demographics: Valuegraphic Marketing for a Values-Driven World</u>
Ashton Applewhite, Age Activist, Ted Speaker, Co-Founder Old School	<u>This Chair Rocks: A Manifesto Against Ageism</u>
Becca Levy, Ph.D., Yale School of Public Health	<u>Breaking the Age Code</u>
Dr. Vânia de la Fuente-Núñez	<u>La trampa de la edad: Cómo los estereotipos edadistas nos perjudican en todas las etapas de la vida (No ficción)</u> (The Age Trap: how ageist stereotypes harm us at all stages of life)




ARTICLES

 Daniel Jolles, Sheila Callaham	<u>The Case For and Against Using Generational Labels: From Gen Z to Boomers</u>
 Sheila Callaham	<u>Age Proofing AI: Why Companies and Employees Share Responsibility</u>
 Daniel Jolles	<u>Why older talent should be a consideration for today's inclusive leader</u>
 J. Mance Gordon	<u>Lump of Labor Fallacy Explained</u>
Graham Pearce, Global Defined Benefit Segment Leader, Mercer	<u>Three employer actions to drive growth in the longevity economy</u>

Communities of Support

 <p>Old School A hub for age equity + ageism awareness</p>	Old School Tools for Dismantling Ageism
 <p>CREAGELESS For those continuing to be. Creative.</p>	Creageless: A Community for Professionals Over 40
 <p>ENCORE ROADMAP</p>	 <p>CHANGING THE NARRATIVE ENDING AGEISM TOGETHER</p>

AEA RESOURCES

AEA on LinkedIn Don't forget to follow us!	 <p>Age Equity Alliance Age Equity Alliance - Unlock The Potential Business Consulting and Services - Austin, Texas - 2K followers - 2-10 employees</p>
AEA on Youtube Don't forget to subscribe!	
AEA on Spotify Thank you for following us!	

A favorite Youtube short: [a crowdsourcing experiment](#) (although now AI can do this in a fraction of a second!)