

# SOA Recently Published Retirement Research

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## RETIREMENT RISK REPORTS

The Society of Actuaries (SOA) recently published several new retirement risk research reports.

All reports are available at:

<http://www.soa.org/research/research-projects/pension/research-post-retirement-needs-and-risks.aspx>

The **2009 Risk and Process of Retirement Survey**, in cooperation with Mathew Greenwald & Associates and EBRI, reports the results of this 2009 survey of retirees and pre-retirees. The survey explored retirees' and pre-retirees' awareness of retirement risk issues and strategies for dealing with them. The report is the fifth in a series. Previous reports in the series can also be found on the same Web page. **Coming soon!** The results of the **2011 Risk and Process of Retirement Survey**.

**"Will Retirement Assets Last a Lifetime?"** and its supplemental report, "What a Difference a Year Makes," explore how retirees make decisions about investing their assets and purchasing financial products, as well as the impact of the financial crisis on retirees. **Coming soon!** A 2011 supplement to this set of reports.

## **"Segmenting the Middle Market: Retirement Risks and Solutions"**

In this two-phase effort, the Phase 1 report defined relevant consumer segments among middle-income / mid-level net worth households. Following up on Phase 1, the Phase 2 report identified basic issues

and potential solutions that are important as mid-level net worth households in or near retirement address the financial risks they face in contemplating retirement. The Phase 2 report also includes 12 user-friendly reference profiles of the pre-retirees and retirees identified in Phase 1.

## SHORT REPORTS FOCUSING ON SPECIFIC RETIREMENT RISK ISSUES

A set of reports highlighting key findings from the 2009 Risk and Process of Retirement Survey is now available. **Coming soon!** Highlight reports of the 2011 Risk and Process of Retirement Survey.

### ***Understanding and Managing the Risks of Retirement***

explores what retirees and pre-retirees understand about various retirement risks and risk management strategies. Risks considered include investment, inflation, health care and longevity.

### ***The Impact of Retirement Risk on Women***

examines retirement risk issues of special interest to women.

### ***The Process of Planning and Personal Risk Management covers***

the results of the most recent survey taken in 2009 specifically as they relate to personal risk management strategies and the process of planning for retirement.

### ***The Impact of the Economy on Retirement Risk***

explores the recent financial turmoil and its impact on retirement risks.

## FUTURE VISIONS OF RETIREMENT

**Retirement 20/20** is a multi-year strategic project that has been undertaken by the SOA's Pension Section. The motivation for the project is to look at where we are today, determine what kind of retirement systems we need for tomorrow and help build them. More information can be found at <http://retirement2020.soa.org/>

## HOUSING IN RETIREMENT

Also on the same webpage, a transcript of a round table discussion of experts on housing issues in retirement is available for downloading. An accompanying monograph of research papers exploring this topic can also be accessed.

