SOCIETY OF ACTUARIES

Recently Published Retirement Research

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 2015 Risk and Process of Retirement Survey, in cooperation with Mathew Greenwald & Associates and EBRI, reports the results of this 2015 survey of retirees and pre-retirees. The survey explores retirees' and pre-retirees' awareness of retirement risk issues and strategies for dealing with them. The full report is now available. Previous reports in the series can also be found on the same Web page.

Managing Retirement Decisions is a landmark effort examining the major decisions encountered in retirement. Drawing upon the expertise of prominent retirement professionals, the result is a thought-provoking series of 11 issue briefs written in everyday language. The briefs tackle a variety of retirement decisions with practical considerations and advice.

HIGHLIGHTS REPORTS FOCUSING ON SPECIFIC RETIREMENT RISK ISSUES

A set of reports highlighting key findings from the 2013 Risk and Process of Retirement Survey was produced in conjunction with the 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 Personal Risk Management Report examines retirement risk issues related to personal risk management.

Impact of Retirement Risk on Women examines retirement risk issues of special interest to women.

The Phases of Retirement Report focuses on what happens during retirement, starting with the time of retirement.

COMING SOON! *2015 HIGHLIGHTS REPORTS*

OPTIMAL RETIREMENT INCOME SOLUTIONS

Optimal Retirement Income Solutions in DC Retirement Plans analyzes solutions for generating reliable retirement income from IRAs, 401(k) and other defined contribution (DC) accounts, and retirement savings in general. The Phase 1 and 2 interim reports are now available.

MANAGING THE IMPACT OF LONG-TERM CARE

Managing the Impact of Long-Term Care Needs and Expense on Retirement Security Monograph expands thinking on how long-term care events impact retirement security and approaches to mitigating the impact of these events.

DC PLAN DESIGN

Foundations in Research for Regulatory Guidelines on the Design and Operation of Retirement Income Solutions in DC Plans is intended to inform plan sponsors on options to better meet the retirement security needs of workers who do not participate in defined benefit plans. The report was authored by Steve Vernon of the Stanford Center on Longevity.

ADVICE AND DECISION MAKING IN RETIREMENT

Models of Financial Advice for Retirement Plans; Considerations for Plan Sponsors provides a comprehensive overview of the professional advice industry. It includes considerations for plan sponsors regarding financial advice.