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The Society of Actuaries' (SOA) Committee on Post Retirement Needs and Risks completed a landmark effort examining major decisions encountered in retirement. Drawing upon the expertise of prominent retirement professionals, the result is a thoughtprovoking series of issue briefs written in everyday language. The briefs tackle a variety of retirement decisions with practical considerations and advice.

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Big Question: When Should I Retire? Key questions to consider, examples showing financial benefits of delaying retirement.



When Retirement

Comes Too Soon

Dealing with

plans turned

retirement.

upside down by

unplanned early



Women Take the Wheel: Destination Retirement Special issues faced by women in retirement.

Finding

advice.

Trustworthv

Financial Advice

Avoiding Pitfalls

Avoid the pitfalls

of seeking financial

for Retirement and



Lump Sum or Monthly Pension: Which to Take? Factors to consider before deciding whether to take a lump sum option.



Designing a Monthly Paycheck for Retirement Replacing a regular paycheck and related options.



Treating AssetSecuring MedicareAllocation Like aand other HealthRoadmapInsurance forTradeoffs, risksthe Retirementin choosingJourneyinvestment assetPre- and post-ageclasses.65 retiree insurancechoices.choices.



Financing Long-Term Care Needs Answers to questions about whether to buy insurance.



Where to Live in Retirement Housing issues and special elderly housing needs.



Estate Planning: Preparing for End of Life Estate planning considerations and key issues.





Deciding When to Claim Social Security When to claim Social Security and the impacts.

Download the briefs and guide at SOA.org