



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: [SOA.org/Retirement-Risks](https://www.soa.org/Retirement-Risks)

The 2017 Risk and Process of Retirement Survey, in cooperation with Mathew Greenwald & Associates and EBRI, reports the results of this 2017 survey of retirees and pre-retirees. The survey explores retirees' and pre-retirees' awareness of retirement risk issues and strategies for dealing with them.

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 issue briefs written in everyday language. The briefs tackle a variety of retirement decisions with practical considerations and advice.

Retirement Literacy is a collection of briefs addressing a number of financial issues such as the cost of retirement and managing risk. The first two briefs are available and explore retirement from a holistic perspective, as well as health and happiness.

Retirement Adequacy in the United States: Should We Be Concerned? summarizes current research on retirement adequacy and compares different measures.

Age Wise is a series of infographics on how life expectancy can impact retirement planning.

Family Structure, Roles and Dynamics Linked to Retirement Security Essay Collection shares thoughts and opinions on the current and potential impact that structure, roles and dynamics of families have on retirement security in the U.S.

Insights on Spending and Asset Management in Retirement summarizes key points from an online discussion on issues related to spending in retirement, asset management and the use of Qualified Longevity Annuity Contracts (QLAC).

Focus Group Series on Retirement Financial Strategies—Post-Retirement Experiences of Individuals Retired for 15 Years or More seeks to understand how middle-income market retired Americans and Canadians manage their assets and spending decisions over the long-term.

Post-Retirement Experiences of Individuals 85+ Years Old seeks to understand how the habits and behaviors from earlier in life play out in the later years of retirement.

Securing Future Retirements Essays Collection shares thoughts and opinions on how to advance the state of effective planning strategies, products and employee benefit plan structures to help secure future retirements.

Understanding and Managing Post-Retirement Risks is a series of reports highlighting the SOA's extensive body of research on post-retirement risks and issues.

HIGHLIGHTS REPORTS FOCUSING ON SPECIFIC RETIREMENT RISK ISSUES

A set of reports highlighting key findings from the 2017 Risk and Process of Retirement Survey was produced in conjunction with the survey.

Key Findings and Issues explores what retirees and pre-retirees understand about various retirement risks and risk management strategies.

Financial Wellness brings together findings from the 2017 Risks and Process of Retirement Survey and the 2017 Financial Wellness Essay Collection.

Housing in Retirement explores decisions in housing facing retirees.

Caregiving for Older Individuals: Perspective of the Caregiver and the Care Recipient pulls together various findings from the growing body of caregiving research to illuminate what people are experiencing and thinking about care today.

Planning for Personal Long-Term Care Risk brings together findings from the survey and previous studies to provide multiple perspectives on relevant long-term care planning issues facing Americans today.

OPTIMAL RETIREMENT INCOME SOLUTIONS

Viability of the Spend Safely in Retirement Strategy explores various design and implementation details for the Spend Safely in Retirement Strategy (SSiRS) intended to be used by middle-income workers and retirees.