

# 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 **2011 Risk and Process of Retirement Survey**, in cooperation with Mathew Greenwald & Associates and EBRI, reports the results of this 2011 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 full report and accompanying overview highlights report are now available. Previous reports in the series can also be found on the same Web page.

## **Financial Recovery for Retirees Continues**

To measure the effects of the dramatic financial downturn on retirees' finances, the SOA, LIMRA, and the International Foundation of Retirement Education (InFRE) have followed up with the respondents of a 2008 study, "Will Retirement Assets Last a Lifetime?" In 2009 and again in 2011, the three organizations investigated how these same respondents have been reacting to the long-term effects of the 2008 market downturn and the continuing financial situation.

**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.

## SHORT REPORTS FOCUSING ON SPECIFIC RETIREMENT RISK ISSUES

A set of reports highlighting key findings from the 2011 Risk and Process of Retirement Survey is now available.

**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 Longevity Report** examines retirement risk issues related to longevity.

**Working in Retirement** covers the results of the most recent survey taken in 2011 specifically as they relate to different aspects of working in retirement.

**The Impact of the Economy on Individual 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.

