



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.

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.

Optimizing Retirement Income by Integrating Retirement Plans, IRAs, and Home Equity provides a framework of analysis and methods that various stakeholders can use to compare and assess strategies for developing lifetime retirement income.

FINANCING RETIREMENT REPORTS

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.

Financial Wellness Essays Collection provides a thought-provoking array of views and perspectives related to financial wellness.

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.

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.

COMING SOON: CAREGIVING AND LONG-TERM CARE HIGHLIGHTS REPORTS

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.