Good morning, and an early, Happy Fourth of July!

The many people who have been members of the EBRI and ASEC team over the decades have done the work itself, and have always worked exceptionally hard to assure that all of our efforts meet the highest standards for objectivity and quality. Many have moved over the years to other places of employment where they have made extraordinary contributions. Change is inevitable, but there is also an inevitable sense of loss. This week I have encountered that bittersweet combination once again, as I share with you the news that Nevin Adams, who has been a highly prized contributor to the EBRI team, has accepted a position with another organization. I am, however, pleased to note that he has agreed to continue his work here through mid-August.

As you know, EBRI, with the support of its members and research partners, has become “the” vital source for “Just the Facts” through independent, objective data and analysis on employee benefits. We do so with an extraordinarily gifted research and education team working with the largest defined contribution and IRA databases in the world; a growing health claims and HSA database; one-of-a-kind, data-rich micro-simulation models like the Retirement Security Projection Model®, and the longest-running retirement and health security annual surveys in the nation—the Retirement Confidence Survey,® the Workplace Benefits Survey,™ the Consumer Engagement in Health Care Survey.™

Since saying “yes” to a request from the Departments’ of Labor and Treasury in 1996 for assistance, ASEC, Chooseto$ave® and The BallparkEstimate® continue to touch thousands of organizations and millions of individuals, helping to move a coalition/coordination effort forward with a minimum of duplicative effort, to make financial capabilities such as planning, goals, saving, retirement planning, and planned decumulation, central parts of every life and household. Again, this work has been accomplished because of the support of members and partners!

Essentially in recognition of what EBRI/ASEC have to offer, I currently have the privilege of serving on the Advisory Board to the Comptroller General of the United States, the Advisory Committee to the Pension Benefit Guarantee Corporation, and the recently formed Commission on Retirement Security and Personal Savings at the Bipartisan Policy Center. This month I have attended sessions of each of these groups, and the fact was reinforced that each has, does, and will make extensive use of EBRI data and research. Most striking, however, was the repeated central point of discussion: the belief that the accelerating rates of change/innovation/turbulence/instability/uncertainty/globalism/communication/information dissemination, etc., make planning increasingly difficult, make assumptions that the future will mirror the past increasingly risky, and make the need for hard data and multiple-scenario modeling of any and all proposed program design changes and public policy changes increasingly important.

With your continued involvement and support, EBRI and ASEC will continue to meet that challenge. We will do so with both robust hard data and our exceptional analytic capabilities, leading to exceptional reports and insights, even as the changing work force, economy, retirement system, health system, and all else that our data and research report on, continue to present urgency and opportunity.

As always, I welcome your thoughts and suggestions.

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