Will Today’s Workers Retire With Adequate Income? And, How Are Today’s Retirees Surviving From A Financial Perspective?

An EBRI-ERF Policy Forum

December 5, 2002
9:00 a.m. - 4:00 p.m.
Arnold & Porter Conference Center
555 12th Street, N.W.
Washington, DC
202/942-5310

1. What do we know about current retirees?
   a. John Ameriks, TIAA-CREF Institute, Retirement Consumption: Insights from a Survey
   b. Craig Copeland, EBRI, How many current retirees have a retirement plan?
   c. Jerry Carnegie, Hewitt Associates, What are the income replacement ratios for employees of large corporations?
   d. Paul Yakoboski, ACLI, Long-term care coverage
   e. Deborah Chollet, Mathematica Policy Research, Prescription drug coverage and Medicare gap coverage

2. Results of state-specific income adequacy studies
   a. Jack VanDerhei, Temple University, and Craig Copeland, EBRI
   b. Panel of state government officials to discuss results
      i. Sen. Sandy Praeger, Kansas State Senate
      iii. Mark Gibson, Policy Advisor, State of Oregon
      iv. Sen. Harriette L. Chandler, Massachusetts State Senate
   c. Panel of members to discuss results
      i. Dan Fox, Milbank Memorial Fund
      ii. Dave Blitzstein, United Food & Commercial Workers International Union
      iii. Dan Holmes, Fidelity Employer Services Company

3. Debt burden of retirees – is it a time bomb waiting to go off?
   a. John Gist, AARP
   b. Lydia Sermons-Ward, National Foundation for Credit Counseling
   c. Al Duarte, InCharge Institute of America & The Association of Independent Consumer Credit Counseling Agencies (AICCCA)

4. The role of investment advice in getting today’s employees ready for retirement
   a. Bill Arnone, Ernst & Young
   b. Jeff Maggioncalda, Financial Engines
   c. Andrew Huddart, mPower
   d. Mike Conway, The AYCO Company

5. What are the ramifications for public policy?
   a. Rob Shapiro, Progressive Policy Institute
   b. Martha Farnsworth Riche, Farnsworth Riche & Associates
   c. Glenn Hubbard, Council of Economic Advisors
   d. Dallas Salisbury, EBRI