Assessing Future Retirement Security with the Results of the EBRI/ERF Retirement Security Projection Model

EBRI/ERF Policy Forum
Arnold & Porter
Paul Porter Conference Room, 10th Floor
555 12th Street NW, Washington, DC
December 4, 2003
Agenda

I. Introduction: Dallas Salisbury, EBRI
   • Reasons for development of the model
   • Areas that will be challenged if tomorrow's elderly have inadequate income

II. Projections of future retirement income adequacy:
    Jack VanDerhei, Temple University and EBRI Fellow, and Craig Copeland, EBRI
    • What if no policies change
    • What if Social Security is reformed
    • What if people access housing wealth in retirement

III. Retiree health and long-term care expenditures: changes ahead?
    • Medicaid (implications of proposed or potential changes in structure and financing): Diane Rowland, Kaiser Family Foundation
    • Medicare (implications of proposed or potential changes in coverage and in Part B costs): Cathy Schoen, Commonwealth Fund
    • Implications for state budgeting: George Naughton, Senior Analyst, Oregon
    • Supplemental health coverage for retirees: Paul Fronstin, EBRI
    • Long-term care (including Long-term care insurance): Robert Friedland, Georgetown University, Center on an Aging Society

IV. Policy levers for changing retiree well being
    • Tax policy: J. Mark Iwry, Esq. Non-Resident Senior Fellow, The Brookings Institution
    • Private-sector retirement benefits policy for large employers: Chris Bone, Aon Consulting
    • Private-sector retirement benefits policy for small employers: Chris Bowman, Principal Financial Group
    • Employment policies: Charles Tharp, Rutgers University
    • Public-sector entitlements: Harriette Chandler, Massachusetts State Senate
    • Insurance products: Nicholas Latrenta, Metlife
    • Women's issues: Sheryl Ruzek, Temple University

V. Synthesis of the day's events: Dan Fox, Milbank Memorial Fund