



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