The Link Between Retirement Security and Long-Term Care
SOA Resource Handout

1) SOA’s Managing the Impact of Long-Term Care Needs and Expense on Retirement Security Monograph
The collection of papers in this monograph explores the impact of long-term care needs and expense on retirement security from a variety of aspects. The monograph can be found at: http://www.soa.org/Library/Monographs/Retirement-Systems/managing-impact-ltc/2014/mono-2014-managing-ltc.aspx

The following is a list of the monograph papers organized by major themes.

Big Picture
- The Impact of Long-Term Care Costs on Retirement Wealth Needs
  Vickie Bajtelsmit and Anna Rappaport
- How American Society will Address LTC Risk, Financing and Retirement
  John Cutler

Caregiving, Family, Health
- Improving Retirement by Integrating Family, Friends, Housing and Support: Lessons Learned From Personal Experience
  Anna Rappaport
- The 65+ Age Wave and the Caregiving Conundrum: The Often Forgotten Piece of the Long-Term Care Puzzle
  Sandra Timmerman
- Home Equity and At-Need Annuities—A Dynamic Long-Term Care Funding Duo
  Steve Cooperstein
- Long-Term Benefits May Reduce End-of-Life Medical Care Costs
  Stephen Holland, Sharrilyn Evered, and Bruce Center

Insurance
- An Overview of the U.S. LTC Insurance Market (Past and Present): The Economic Need for LTC Insurance, the History of LTC Regulation & Taxation and the Development of LTC Product Design Features

International
- How Adequate is Long-Term Care Protection in Developed Countries?
  Doug Andrews

Ideas for the Future
- Financing Future LTSS and Long Life Through More Flexible 401(k)s and IRAs
  Karl Polzer
- The American Long-Term Care Insurance Program (ALTCIP)
  Paul Forte
- Home Equity: A Strategic Resource for Long-Term Services and Supports
  Barbara Stucki
- An Affordable Long-Term Care Solution Through Risk Sharing
  Kailan Shang, Hua Su, and Yu Lin

2) Land this Plane: A Delphi Research Study of Long-Term Care Financing Solutions
This study, using the Delphi method, explores the opinions of various Long-Term Care experts and stakeholders on a wide range of LTC financing issues and potential solutions. The study can be found at: http://www.soa.org/Research/Research-Projects/Ltc/research-2014-ltp-ltc.aspx