“Rethinking Retirement” is the theme for this issue of Investments & Wealth Monitor, a timely topic that has been prompted in large part by COVID-19, which has many investors asking for advisors’ help in re-evaluating their retirement plans and their retirement readiness.

We begin this issue by examining the impact of COVID-19 with David John and Jennifer Schramm’s article, “Building Financial Security in a Changing Labor Market.” The next two articles, from industry thought leaders Dana Anspach and Michael Liersch, show how advisors can use those concepts. Anspach writes about a specific retirement spending tool in “Demonstrating Advisor Gamma Through Market.” The next two articles, from industry thought leaders Dana Anspach and Michael Liersch, show how advisors can use those concepts. Anspach writes about a specific retirement spending tool in “Demonstrating Advisor Gamma Through Market.” The next two articles, from industry thought leaders Dana Anspach and Michael Liersch, show how advisors can use those concepts. Anspach writes about a specific retirement spending tool in “Demonstrating Advisor Gamma Through Market.” The next two articles, from industry thought leaders Dana Anspach and Michael Liersch, show how advisors can use those concepts. Anspach writes about a specific retirement spending tool in “Demonstrating Advisor Gamma Through Market.” The next two articles, from industry thought leaders Dana Anspach and Michael Liersch, show how advisors can use those concepts. Anspach writes about a specific retirement spending tool in “Demonstrating Advisor Gamma Through Market.”


In order to help members better understand a couple of maligned retirement options—reverse mortgages and annuities—the IWM Editorial Advisory Board (EAB) asked two experts for help. Shelley Giordano outlines the positives and negatives of using a home as a retirement asset in “21st Century Reverse Mortgages: Don’t Ignore This Important Retirement-Planning Asset,” and Tamiko Toland helps us understand “The Role of Annuities in an Income-Starved Environment.”

As we close out 2021, IWI Editorial Director Debbie Nochlin and I thank the EAB for its help identifying topics, sourcing authors, and curating content for IWM. Every year a few committee members roll off the EAB and we recruit new members. If you are interested in joining the EAB, please contact Debbie or me directly.


We begin 2022 by examining the impact of COVID-19 with David John and Jennifer Schramm’s article, “Building Financial Security in a Changing Labor Market.” The next two articles, from industry thought leaders Dana Anspach and Michael Liersch, show how advisors can use those concepts. Anspach writes about a specific retirement spending tool in “Demonstrating Advisor Gamma Through Market.” The next two articles, from industry thought leaders Dana Anspach and Michael Liersch, show how advisors can use those concepts. Anspach writes about a specific retirement spending tool in “Demonstrating Advisor Gamma Through Market.”

As we close out 2021, IWI Editorial Director Debbie Nochlin and I thank the EAB for its help identifying topics, sourcing authors, and curating content for IWM. Every year a few committee members roll off the EAB and we recruit new members. If you are interested in joining the EAB, please contact Debbie or me directly.

Anthony B. Davidow, CIMA®
Chair, Investments & Wealth Monitor
Editorial Advisory Board