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INVESTMENTS & WEALTH MONITOR

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This issue of Investments & Wealth Monitor focuses on longevity risk and highlights its implications for advisors and investors. These are timely and important matters, particularly as current market conditions have created a challenging backdrop for generating sufficient returns and income, especially as retirees are living longer and more productive lives.


Editorial board member and frequent contributor Avi Sharon, and colleague Jennifer Gongola offer an interesting perspective regarding longevity risk in their article, “Bridging Client Biases in Retirement: Framing Effects, the Familiarity Principle, and an Income-Centric Approach to Planning.” Harry Margolis then presents a sobering and pragmatic angle with “Preparing for the Impending Long-Term Care Crisis,” and Bob Mauterstock examines “Creating a Care Plan for Your Aging Clients.”

Stan Treger and Amy Szostak address an issue of interest to fiduciaries in their article, “Sustainable Investing: A Trustee’s Friend or Foe?” We then close out this issue—and 2022—with far-reaching interviews with two retirement—industry thought leaders, Anne Lester and Wade Pfau. In fact, the discussion with Pfau covered so much ground that it will be continued on these pages in 2023. And finally, Phillip Toews shares recent research about the investor-advisor disconnect.

We wish everyone a happy holiday season and look forward to you joining us for a very interesting 2023. The editorial advisory board has been actively engaged in sourcing and curating articles for the coming year. If you have ideas about topics and authors, please reach out to Editorial Director Debbie Nochlin or me directly. Happy Holidays!

Anthony B. Davidow, CIMA®
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Editorial Advisory Board