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Editor's Letter

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PENSION & LONGEVITY RISK TRANSFER

for INSTITUTIONAL INVESTORS
FALL 2016

FROM THE EDITOR

Longevity risk is one of the most significant challenges facing retirement planning around the world. The aging population and increased life expectancy coupled with uncertainty about government benefits make this a very complex issue.

With our goal to provide a valuable reference tool to educate market participants on the latest developments on pension risk transfer, we present the 5th annual installment of *The Guide to Pension and Longevity Risk Transfer for Institutional Investors*.

The Guide includes discussions about the current views on longevity risk solutions such as:

- strategies available to mitigate pension risk in the current economic environment while bolstering participants' benefit security
- benefits and suitability of assets-in-kind (AIK) as an attractive alternative to cash in an annuity buyout
- projecting longevity and mortality using stochastic models
- bundling capital markets and insurance solutions as an alternative risk management solution
- an overview of recent EU case law regarding pensions
- the impact of longevity risk on plans, methods of assessing the effects of specific changes to longevity and market volatility, ways in which longevity risk can interact with other risks, strategies, and sophisticated technology-based solutions
- the multiple considerations facing a corporate sponsor making decisions about its defined benefit pension plan
- why the Canadian markets have not seen such rapid expansion of the pension risk settlement market and what may occur to allow it to reach its full potential

As always, we hope you find the information presented in the Guide useful and insightful.

BRIAN R. BRUCE
Editor

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A B O U T T H E E D I T O R

BRIAN R. BRUCE

Editor

Brian is CEO and Chief Investment Officer of Hillcrest Asset Management, an institutional equity management firm based in Dallas. He is also an adjunct professor at Baylor University.

Brian previously was Chief Investment Officer in charge of equity management and research at PanAgora Asset Management. Prior to joining PanAgora, Brian was a professor at Southern Methodist University and President and Chief Investment Officer of InterCoast Capital, a Dallas-based subsidiary of a Fortune 500 energy company. He previously worked at State Street Global Advisors, the Northern Trust Company, and Stein Roe & Farnham.

Brian received his M.B.A. from the University of Chicago, M.S. in Computer Science from DePaul University, and a B.S. in Business Administration from Illinois State University. He is a member of the Illinois State University College of Business Hall of Fame and is winner of the University of Chicago Graduate School of Business CEO Award.

Brian has published numerous scholarly articles and books including “Analysts, Lies, and Statistics,” which he co-authored with former Harvard Business School professor Mark Bradshaw. He is also the Editor-in-Chief of Institutional Investor’s *The Journal of Investing*, Editor of *The Journal of Trading*, Editor of *The Journal of Index Investing*, and Editor of the *Journal of Behavioral Finance*. Brian frequently appears in the media including NBC, ABC, CNBC, *The Wall Street Journal*, Bloomberg, *The Washington Post*, *The New York Times*, Associated Press, Reuters, *The Financial Times*, and *Business Week*. Brian also serves on many boards of directors including The Center for Investment Research, Cushing® Closed-End Funds, the CM family of mutual funds, and the Institute of Behavioral Finance.

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