EDITOR'S NOTE

Anthony B. Davidow, CIMA®

This issue of *Investments & Wealth Monitor* (*I&WM*) explores managing retirement risks by leveraging faculty from the Retirement Management Advisor® (RMA®) program and other industry experts. This topic is particularly timely given the recent volatility associated with COVID-19 and the impact it has had on client portfolios.

We begin with an in-depth Q&A with Bob Powell, *Retirement Management Journal* editor and *I&WM* editorial board member, covering a range of issues that includes changes in the retirement industry, retirement risks, and the merits of the RMA program. Anna Rappaport, an RMA faculty member, provides two articles in this issue, the first of which is "Retirement Risks: Vital Issues for the Post-Retirement Period"; and Harry Margolis contributes "The Three Biggest Risks to Retirement Planning and How to Avoid Them."

Marcia Mantell offers ways for couples to maximize retirement security in "Social Security: Making Smarter Decisions Is Critical to Mitigating Retirement Risks Women Face." Halvard Kvaale, Barbara Reinhard, and Amit Sinha discuss the evolution of target-date funds with "Target-Date Story: To Retirement and Beyond"; and Investments & Wealth Institute Vice Chair Dorothy Bossung provides a practical perspective with her article, "A Concrete Plan for Retirement: Retirement Policy Statements." Rene Martel and Avi Sharon give us timely insights with "Don't Drop the Baton: Sequence Risk and the Decumulation Dilemma." And Anna Rappaport's second article is titled, "Reboot, Rewire, or Retire? Helping Clients Think About Phased Retirement."

We also address the impact of the coronavirus. Arun Muralidhar offers a provocative article, "It Is Time for a Novel Investment Approach," and Dan diBartolomeo digs into the data with "The Novel Coronavirus Pandemic: A Quantitative View." Lastly, there is my lively discussion examining "Extraordinary Times: Managing Market Volatility and Engaging with Clients," with Investments & Wealth Institute board members Todd Wagenberg, Scott Welch, and Brian Ullsperger; and we close with a timely review of William Reichenstein's book, *Income Strategies: How to Create a Tax-Efficient Withdrawal Strategy to Generate Retirement Income*.

Stay safe—and stay well!

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

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