



March 2019

In financial services, retirement, ironically, is the topic that never gets old. But there is good reason for that—it's an inevitable financial milestone for us one way or the other. How we look at retirement may have everything to do with how successful we are at planning for it AND enjoying it when the time comes. Below, a few great links to get your wheels turning, whether retirement is around the corner or way down the road.



ANDREWS LUCIA
WEALTH MANAGEMENT LLC

BRIDGING THE GAP

A new study from Harvard Business School, MIT Sloan School of Management, Questrom School of Business and Bentley University focuses on the mental and emotional effects of retirement. They found retirees go through two main processes: life restructuring and identify bridging.

Listen to this [Harvard Business Review IdeaCast](#), and hear why professor and organizational behavioral researcher **Teresa Amabile** believes looking at your life through the lens of an architect can be the difference between a successful retirement and one that lacks the fulfillment you imagined the 'golden years' would bring.

MIDLIFE PORTFOLIO MOVES

It could be because it's the decade when both income and expenses peak, or because so many begin to see their parents' retirement plans play out (or both!), but retirement—and its financial demands—often seem especially eye-opening for investors in their 40s. **Tim Maurer** of the BAM ALLIANCE—himself a 40-something—shares on [CNBC](#) how to make the most of the opportunities before you when it comes to saving for retirement.



THE LONGEVITY CHALLENGE

Although neither gender is exempt from the realities of retirement planning, because they statistically live longer and tend to amass less, women face two significant hurdles when it comes to ensuring they have enough. Larry Swedroe and Wealth Advisor Katie Keary [weigh in](#) on how women can be proactive when it comes to saving.

Follow us on social media

