

JEAN-PIERRE AUBRY

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EDUCATION:

2019 **Boston College**
M.S. in Finance

2004 **University of Pennsylvania**
B.A. with majors in Economics and Psychology

RESEARCH AND POLICY INTERESTS:

Retirement and Labor Policy, Municipal Finance, Institutional Investing

EMPLOYMENT:**2006-present Center for Retirement Research at Boston College**

2025-present Associate Director, Retirement Plans and Finance

2011-2024 Associate Director, State and Local Research

2008-2010 Research Associate

2006-2008 Research Assistant

RESEARCH AND POLICY CONSULTING:

2018-2021 2019 and 2021 Rhode Island Debt Affordability Study. Provided expertise and comparative analysis regarding Rhode Island's Pension and OPEB debt.

2015-2016 Research consultant to the Kinder Institute at Rice University. Analysis of Houston's three pension systems.

2014-2015 Consultant to Connecticut's Office of Policy and Management. Analysis of Connecticut's two largest state retirement systems.

2013-2015 Pension Lab Calculator by the Laura and John Arnold Foundation. Worked as a consultant providing expertise on pension modeling and analysis.

2011-2012 State Budget Crisis Task Force headed by Richard Ravitch and Paul A. Volcker. Performed pension modeling and analysis for pension plans in 6 states studied by the Task Force: California, Illinois, New Jersey, New York, Texas, and Virginia.

2009 The Special Commission to Study the Massachusetts Contributory Retirement Systems. Lead staff to Alicia H. Munnell, Commission Chairwoman.

OTHER PROFESSIONAL ACTIVITIES:

2009-present Public Plan Database (<https://publicplansdata.org/>). Manage the development and maintenance of the PPD, a nationally-recognized resource for public pension data and research.

2025-present Medicaid HCBS Database (<https://crr.bc.edu/project-page/state-medicaid-hcbs-database/>). Manage the development and maintenance of the HCBS Database, a novel new resource for Medicaid HCBS data and research.

SELECTED PUBLICATIONS:

Refereed Journal Articles

“State and Local Government Employees Without Social Security Coverage: What Percentage Will Earn Pension Benefits That Fall Short of Social Security Equivalence?” with Siyan Liu, Alicia H. Munnell, Laura D. Quinby, and Glenn R. Springstead. 2022. *Social Security Bulletin* 82(3): 1-20.

“Pensions for State and Local Government Workers Not Covered by Social Security: Do Benefits Meet Federal Standards?” with Laura D. Quinby and Alicia H. Munnell. 2020. *Social Security Bulletin* 80(3): 1-29.

“Multiemployer Plans – Evaluating a Proposal to Spread the Pain,” with Alicia H. Munnell, Wenliang Hou, and Anthony Webb. 2019. *Journal of Pension Economics and Finance* 18(1): 124-139.

“An Overview of the State and Local Government Pension/OPEB Landscape,” with Alicia H. Munnell. 2017. *The Journal of Retirement* 5(1): 117-137.

“COLA Cuts in State-Local Pensions,” with Alicia H. Munnell and Mark Cafarelli. 2016. *Journal of Pension Economics and Finance* 15(3): 311-332.

“How Would GASB Proposals Affect State and Local Pension Reporting?” with Alicia H. Munnell, Josh Hurwitz, and Laura D. Quinby. 2012. *Journal of Government Financial Management* 61(2): 18-24.

“Public Pension Funding Standards in Practice,” with Alicia H. Munnell and Laura Quinby. 2011. *Journal of Pension Economics and Finance* 10(2): 247-268.

Chapters in Books

“Wills, Wealth, and Race,” with Alicia H. Munnell and Gal Wettstein. 2025. In *Reducing Retirement Inequality: Building Wealth and Old-Age Resilience*, edited by Olivia S. Mitchell and Nikolai Roussanov. Oxford, UK: Oxford University Press.

Working Papers

“What Stock Allocations Do Advisors Suggest and Does It Impact Clients?” with Yimeng Yin. 2025. Working Paper 2025-10. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Do Desired Stock Allocations Differ From Actual Holdings?” with Yimeng Yin. 2025. Working Paper 2025-9. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Much Could Will-Writing Reduce the Racial Wealth Gap?” with Alicia H. Munnell, Gal Wettstein, and Oliver Shih. 2024. Working Paper 2024-16. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“What Risks Do Near Retirees and Retirees Face from Inflation?” with Laura D. Quinby. 2024. Working Paper 2024-4. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Do Older Households React to Inflation?” with Laura D. Quinby. 2024. Working Paper 2024-3. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Can Incentives Increase the Writing of Wills? An Experiment,” with Alicia H. Munnell and Gal Wettstein. 2023. Working Paper 2023-27. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Wills, Wealth, and Race,” with Alicia H. Munnell and Gal Wettstein. 2023. Working Paper 2023-10. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“What Share of Noncovered Public Employees Will Earn Benefits that Fall Short of Social Security?” with Siyan Liu, Alicia H. Munnell, Laura D. Quinby, and Glenn Springstead. 2022. Working Paper 2022-4. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Will COVID-19 Affect Pensions for Noncovered Workers?” with Kevin Wandrei and Laura D. Quinby. 2021. Working Paper 2021-19. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How to Increase Usage of SSA’s Online Tools,” with Kevin Wandrei. 2021. Working Paper 2021-15. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Spillovers from State and Local Pensions to Social Security: Do Benefits for Uncovered Workers Meet Federal Standards?” with Laura D. Quinby and Alicia H. Munnell. 2018. Working Paper 2018-9. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The New Hampshire Retirement System: A Look Backward and Forward,” with Caroline V. Crawford. 2018. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Multiemployer Pension Plans: Current Status and Future Trends,” with Alicia H. Munnell and Caroline V. Crawford. 2017. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Update on the City of Philadelphia’s DROP Program.” December 2017. Philadelphia, PA: The Pennsylvania Intergovernmental Cooperation Authority (PICA).

“An Overview of the Pension/OPEB Landscape,” with Alicia H. Munnell. 2016. Working Paper 2016-11. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Final Report on Connecticut’s State Employees Retirement System and Teachers’ Retirement System,” with Alicia H. Munnell. 2015. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Recruiting and Retaining High-Quality State and Local Workers: Do Pensions Matter?” with Alicia H. Munnell and Geoffrey T. Sanzenbacher. 2015. Working Paper 2015-1. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Impact of Mandatory Coverage on State and Local Budgets,” with Alicia H. Munnell and Anek Belbase. 2014. Working Paper 2014-9. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Would GASB Proposals Affect State and Local Pension Reporting?” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2012. Working Paper 2012-17. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Prepared are State and Local Workers for Retirement?” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2011. Working Paper 2011-15. Chestnut Hill, MA: Center for Retirement Research at Boston College.

Other Publications

“Can Equity Investments Help Social Security’s Finances?” with Anqi Chen and Alicia H. Munnell. 2026. *Issue in Brief* 26-10. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Can Equity Investments Help Social Security’s Long-Run Financing?” with Anqi Chen and Alicia H. Munnell. 2026. Special Report. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Rise of Alternative Designs for Public Plans,” with Laura D. Quinby. 2025. *Issue in Brief* 25-21. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“What Stock Allocations Do Advisors Suggest and Does It Impact Clients?” with Yimeng Yin. 2025. *Issue in Brief* 25-19. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Why Do Desired Stock Allocations Differ from Actual Holdings?” with Yimeng Yin 2025. *Issue in Brief* 25-17. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“An Overview of Market Risks for Near-Retirees and Retirees,” with Yimeng Yin. 2025. Special Report. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Funded Status of Public Plans Keeps Improving – Albeit Modestly,” with Alicia H. Munnell. 2025. *Issue in Brief* 25-15. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Much Could Will-Writing Reduce the Racial Wealth Gap?” with Alicia H. Munnell, Gal Wettstein, and Oliver Shih. 2024. *Issue in Brief* 24-23. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“What Role Does State Government Play in Funding Teacher Pensions?” 2024. *Issue in Brief* 24-20. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Do Older Households React to Inflation?” with Laura D. Quinby. 2024. *Issue in Brief* 24-14. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Do Public Pension Plan Returns Compare to Simple Index Investing?” with Yimeng Yin. 2024. *Issue in Brief* 24-13. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Does Inflation Impact Near Retirees and Retirees?” with Laura D. Quinby. 2024. *Issue in Brief* 24-12. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“What Risks Do Near Retirees and Retirees Face from Inflation, and How Do They React?” with Laura D. Quinby. 2024. Special Report. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Can Incentives Increase the Writing of Wills?” with Alicia H. Munnell and Gal Wettstein. 2024. *Issue in Brief* 24-9. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Why Did IBM Reopen Its Defined Benefit Plan? Will Others Follow?” with Alicia H. Munnell and Yimeng Yin. 2024. *Issue in Brief* 24-4. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Satisfied Are Retirees with the Social Security Claiming Process?” 2023. *Issue in Brief* 23-21. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Does the Social Security Claiming Process Vary by Race?” 2023. *Issue in Brief* 23-19. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Wills, Wealth, and Race,” with Alicia H. Munnell and Gal Wettstein. 2023. *Issue in Brief* 23-17. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Public Pension Funded Levels Improve Amidst Rising Interest Rates,” with Yimeng Yin. 2023. *Issue in Brief* 23-15. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Public Pension Investment Update: Have Alternatives Helped or Hurt?” 2022. *Issue in Brief* 22-20. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Public Pensions Contend with Falling Markets and Rising Inflation.” 2022. *Issue in Brief* 22-13. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Legacy Debt in Public Pensions: A New Approach.” 2022. *State and Local Pension Plans Issue in Brief* 84. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Forensic Analysis of Pension Funding: A Tool for Policymakers.” 2022. *State and Local Pension Plans Issue in Brief* 83. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Many Public Workers without Social Security Could Fall Short?” with Alicia H. Munnell, Laura D. Quinby, and Glenn Springstead. 2022. *State and Local Pension Plans Issue in Brief* 82. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Has COVID Affected Pensions for Workers without Social Security?” with Kevin Wandrei. 2022. *State and Local Pension Plans Issue in Brief* 81. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How to Increase Usage of Social Security’s Online Tools.” 2022. *Issue in Brief* 22-1. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“What Do We Know About Public Teacher Compensation?” with Siyan Liu. 2021. *State and Local Pension Plans Issue in Brief* 80. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Do All State and Local Workers Receive an Annuity in Retirement?” with Kevin Wandrei. 2021. *State and Local Pension Plans Issue in Brief* 79. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“2021 Update: Public Plan Funding Improves as Workforce Declines,” with Kevin Wandrei. 2021. *State and Local Pension Plans Issue in Brief* 78. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Do Public Workers Without Social Security Get Comparable Benefits?” with Laura D. Quinby and Alicia H. Munnell. 2021. *State and Local Pension Plans Issue in Brief* 77. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Internal vs. External Management for State and Local Pension Plans,” with Kevin Wandrei. 2020. *State and Local Pension Plans Issue in Brief* 75. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“ESG Investing and Public Pensions: An Update,” with Anqi Chen, Patrick Hubbard, and Alicia H. Munnell. 2020. *State and Local Pension Plans Issue in Brief* 74. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“2020 Public Plan Investment Update and COVID-19 Market Volatility.” 2020. *State and Local Pension Plans Issue in Brief* 73. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Status of Local Government Pension Plans in the Midst of COVID-19,” with Kevin Wandrei. 2020. *Issue in Brief*. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“2020 Update: Market Decline Worsens the Outlook for Public Plans,” with Alicia H. Munnell and Kevin Wandrei. 2020. *Issue in Brief*. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Have Localities Shifted Away from Traditional Defined Benefit Plans?” with Kevin Wandrei. 2020. *State and Local Pension Plans Issue in Brief* 70. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“An Introduction to Police and Fire Pensions,” with Kevin Wandrei. 2020. *State and Local Pension Plans Issue in Brief* 69. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Update on the Funded Status of State and Local Pension Plans – FY 2018,” with Caroline V. Crawford. 2019. *Issue in Brief*. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Investment Update: How Do Public Plans Value Their Assets?” with Kevin Wandrei. 2019. *State and Local Pension Plans Issue in Brief* 68. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Does Public Pension Board Composition Impact Returns?” with Caroline V. Crawford. 2019. *State and Local Pension Plans Issue in Brief* 67. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Has the Decline in Assumed Returns Affected Plan Costs?” with Alicia H. Munnell and Kevin Wandrei. 2019. *State and Local Pension Plans Issue in Brief* 66. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Maintaining Target Allocations: Effects on Plan Performance,” with Kevin Wandrei. 2019. *State and Local Pension Plans Issue in Brief* 64. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Impact of Public Sector Assumed Returns on Investment Choices,” with Caroline V. Crawford. 2019. *State and Local Pension Plans Issue in Brief* 63. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Stability in Overall Pension Plan Funding Masks a Growing Divide,” with Caroline V. Crawford and Kevin Wandrei. 2018. *State and Local Pension Plans Issue in Brief* 62. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Do Fees Affect Plans’ Ability to Beat Their Benchmarks?” with Caroline V. Crawford. 2018. *State and Local Pension Plans Issue in Brief* 61. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“What Explains Differences in Public Pension Returns Since 2001?” with Anqi Chen, Alicia H. Munnell, and Kevin Wandrei. 2018. *State and Local Pension Plans Issue in Brief* 60. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Have Pension Cuts Affected Public Sector Competitiveness?” with Laura D. Quinby and Geoffrey T. Sanzenbacher. 2018. *State and Local Pension Plans Issue in Brief* 59. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Funded Status of Local Pensions Inches Closer to States,” with Caroline V. Crawford and Alicia H. Munnell. 2018. *State and Local Pension Plans Issue in Brief* 58. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Have Municipal Bond Markets Reacted to Pension Reform?” with Caroline V. Crawford and Alicia H. Munnell. 2017. *State and Local Pension Plans Issue in Brief* 57. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“State and Local Pension Plan Funding Sputters in FY 2016,” with Caroline V. Crawford and Alicia H. Munnell. 2017. *State and Local Pension Plans Issue in Brief* 56. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“A First Look at Alternative Investments and Public Pensions,” with Anqi Chen and Alicia H. Munnell. 2017. *State and Local Pension Plans Issue in Brief* 55. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“State and Local Pension Reform Since the Financial Crisis,” with Caroline V. Crawford. 2017. *State and Local Pension Plans Issue in Brief* 54. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Does Public Pension Funding Affect Where People Move?” with Caroline V. Crawford. 2016. *State and Local Pension Plans Issue in Brief* 52. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Will Pensions and OPEBs Break State and Local Budgets?” with Alicia H. Munnell. 2016. *State and Local Pension Plans Issue in Brief* 51. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Funding of State and Local Pensions: 2015-2020,” with Alicia H. Munnell. 2016. *State and Local Pension Plans Issue in Brief* 50. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Are Counties Major Players in Public Pension Plans?” with Alicia H. Munnell. 2016. *State and Local Pension Plans Issue in Brief* 49. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Big a Burden Are State and Local OPEB Benefits?” with Alicia H. Munnell and Caroline V. Crawford. 2016. *State and Local Pension Plans Issue in Brief* 48. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“GASB 68: How Will State Unfunded Pension Liabilities Affect Big Cities?” with Alicia H. Munnell. 2016. *State and Local Pension Plans Issue in Brief* 47. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Investment Returns: Defined Benefit vs. Defined Contribution Plans,” with Alicia H. Munnell and Caroline V. Crawford. 2015. *Issue in Brief* 15-21. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Forensics and the Future of a Connecticut Pension Plan,” with Alicia H. Munnell. 2015. *State and Local Pension Plans Issue in Brief* 46. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Has the Shift to Defined Contribution Plans Affected Saving?” with Alicia H. Munnell and Caroline V. Crawford. 2015. *Issue in Brief* 15-16. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Funding of State and Local Pensions: 2014-2018,” with Alicia H. Munnell. 2015. *State and Local Pension Plans Issue in Brief* 45. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Does Mortality Differ Between Public and Private Sector Workers?” with Alicia H. Munnell, Jean-Pierre Aubry, and Geoffrey T. Sanzenbacher. 2015. *State and Local Pension Plans Issue in Brief* 44. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Will Longer Lifespans Affect State and Local Pension Funding?” with Alicia H. Munnell, Jean-Pierre Aubry, and Mark Cafarelli. 2015. *State and Local Pension Plans Issue in Brief* 43. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Did State/Local Plans Become Underfunded?” with Alicia H. Munnell and Mark Cafarelli. 2015. *State and Local Pension Plans Issue in Brief* 42. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Multiemployer Plans – A Proposal to Spread the Pain,” with Alicia H. Munnell, Wenliang Hou and Anthony Webb. 2014. *Issue in Brief* 14-17. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Do Public Pensions Help Recruit and Retain High-Quality Workers?” with Alicia H. Munnell and Geoffrey T. Sanzenbacher. 2014. *State and Local Plans Issue in Brief* 41. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Can PBGC Save Multiemployer Plans?” with Alicia H. Munnell. 2014. *Issue in Brief* 14-16. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Financial Status of Private Sector Multiemployer Pension Plans,” with Alicia H. Munnell. 2014. *Issue in Brief* 14-14. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Private Sector Multiemployer Pension Plans – A Primer,” with Alicia H. Munnell. 2014. *Issue in Brief* 14-13. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“An Update on Pension Obligations Bonds,” with Alicia H. Munnell and Mark Cafarelli. 2014. *State and Local Plans Issue in Brief* 40. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Funding of State and Local Pensions: 2013-2017,” with Alicia H. Munnell and Mark Cafarelli. 2014. *State and Local Plans Issue in Brief* 39. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“COLA Cuts in State/Local Pension,” with Alicia H. Munnell and Mark Cafarelli. 2014. *State and Local Plans Issue in Brief* 38. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Defined Contribution Plans in the Public Sector: An Update,” with Alicia H. Munnell and Mark Cafarelli. 2014. *State and Local Plans Issue in Brief* 37. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Are City Fiscal Woes Widespread? Are Pension the Cause?” with Alicia H. Munnell, Joshua Hurwitz, and Mark Cafarelli. 2013. *State and Local Plans Issue in Brief* 36. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Gauging the Burden of Public Pension on Cities,” with Alicia H. Munnell, Joshua Hurwitz, and Mark Cafarelli. 2013. *State and Local Plans Issue in Brief* 35. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Sensitive is Public Pension Funding to Investment Returns?” with Alicia H. Munnell and Joshua Hurwitz. 2013. *State and Local Plans Issue in Brief* 34. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Funding of State and Local Pension: 2012-2016,” with Alicia H. Munnell, Joshua Hurwitz, and Madeline Medenica. 2013. *State and Local Plans Issue in Brief* 32. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“State and Local Pension Costs: Pre-Crisis, Post-Crisis, and Post-Reform,” with Alicia H. Munnell, Anek Belbase, and Joshua Hurwitz. 2013. *State and Local Plans Issue in Brief* 30. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Locally-Administered Pension Plans: 2007-2011,” with Alicia H. Munnell and Joshua Hurwitz. 2013. *State and Local Plans Issue in Brief* 29. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Retirement Provisions Affect Tenure of State and Local Workers,” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2012. *State and Local Plans Issue in Brief* 27. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Impact of Long Vesting Periods on State and Local Workers,” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2012. *State and Local Plans Issue in Brief* 26. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Funding of State and Local Pensions: 2011-2015,” with Alicia H. Munnell, Joshua Hurwitz, Madeline Medenica, and Laura Quinby. 2012. *State and Local Plans Issue in Brief* 24. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Would GASB Proposals Affect State and Local Pension Reporting?” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 23. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“How Prepared are State and Local Workers for Retirement?” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 22. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Comparing Wealth in Retirement: State-Local Versus Private Sector Workers,” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 21. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Comparing Compensation: State-Local Versus Private Sector Workers,” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 20. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Unions and Public Pension Benefits,” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 19. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“An Update on Locally-Administered Pension Plans,” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 18. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Funding of State and Local Pensions in 2010,” with Alicia H. Munnell, Joshua Hurwitz, Madeline Medenica, and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 17. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“A Role for Defined Contribution Plans in the Public Sector,” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 16. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Can State and Local Pensions Muddle Through?” with Alicia H. Munnell, Joshua Hurwitz, and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 15. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Impact of Pensions on State Borrowing Costs,” with Alicia H. Munnell and Laura Quinby. 2011. *State and Local Plans Issue in Brief* 14. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Impact of Public Pensions on State and Local Budgets,” with Alicia H. Munnell and Laura Quinby. 2010. *State and Local Plans Issue in Brief* 13. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Problems with State-Local Final Pay Plans and Options for Reform,” with Peter A. Diamond, Alicia H. Munnell, and Gregory Leiserson. 2010. *State and Local Plans Issue in Brief* 12. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Valuing Liabilities in State and Local Plans,” with Alicia H. Munnell, Richard W. Kopcke, and Laura Quinby. 2010. *State and Local Plans Issue in Brief* 11. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“The Funding of State and Local Pensions: 2009-2013,” with Alicia H. Munnell and Laura Quinby. 2010. *State and Local Plans Issue in Brief* 10. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Returns on 401(k) Assets by Cohort,” with Alicia H. Munnell. 2009. *Issue in Brief* 10-6. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Pension Obligation Bonds: Financial Crisis Exposes Risks,” with Alicia H. Munnell, Thad Calabrese, and Ashby Monk. 2009. *State and Local Plans Issue in Brief* 9. Chestnut Hill, MA: Center for Retirement Research at Boston College.

“Employers’ (Lack of) Response to the Retirement Income Challenge,” with Steven A. Sass and Kelly Haverstick. 2010. *Issue in Brief* 9-13. Chestnut Hill, MA: Center for Retirement Research.

“The Funding Status of Locally Administered Pension Plans,” with Alicia H. Munnell and Kelly Haverstick. 2008. *State and Local Plans Issue in Brief* 8. Chestnut Hill, MA: Center for Retirement Research.

“The Financial Crisis and State/Local Defined Benefit Plans,” with Alicia H. Munnell and Dan Muldoon. 2008. *Issue in Brief* 8-19. Chestnut Hill, MA: Center for Retirement Research.

“The Financial Crisis and Private Defined Benefit Plans,” with Alicia H. Munnell and Dan Muldoon. 2008. *Issue in Brief* 8-18. Chestnut Hill, MA: Center for Retirement Research.

“Why Don’t Some States and Localities Pay Their Required Pension Contributions?” with Alicia H. Munnell, Kelly Haverstick and Alex Golub-Sass. 2008 *State and Local Plans Issue in Brief* 7. Chestnut Hill, MA: Center for Retirement Research.

“Why Does Funding Status Vary Among State and Local Plans?” with Alicia H. Munnell and Kelly Haverstick. 2008. *State and Local Plans Issue in Brief* 6. Chestnut Hill, MA: Center for Retirement Research.

“The Miracle of Funding by State and Local Pension Plans,” with Alicia H. Munnell, Kelly Haverstick, and Steven A. Sass. 2008. *State and Local Plans Issue in Brief* 5. Chestnut Hill, MA: Center for Retirement Research.

“What Do We Know About the Universe of State and Local Plans?” with Alicia H. Munnell, Kelly Haverstick, and Mauricio Soto. 2008. *State and Local Plans Issue in Brief* 4. Chestnut Hill, MA: Center for Retirement Research.

“Do People Plan to Tap Their Home Equity in Retirement?” with Alicia H. Munnell and Mauricio Soto. 2007. *Issue in Brief* 7-7. Chestnut Hill, MA: Center for Retirement Research.

“Employers Lukewarm About Retaining Older Workers,” with Andrew D. Eschtruth and Steven A. Sass. 2007. *Issue in Brief* 10. Chestnut Hill, MA: Center for Retirement Research.

“Employer Survey: 1 of 4 Boomers Won’t Retire Because They Can’t,” with Alicia H. Munnell and Steven A. Sass. 2006. *Work Opportunity Issue in Brief* 6. Chestnut Hill, MA: Center for Retirement Research.

PRESENTATIONS:

- 2024 - NASBO Spring Meeting (April)
 - NCPERS Chief Officers Summit (June)
 - Gerontology Society of America Annual Meeting (November)
- 2023 - The Civic Federation (November)
 - New York City Office of the Actuary (December)
- 2022 - 68th Annual IFEBP Conference (October)

- 2019 - Connecticut Pension Academy (January)
 - National Tax Association Spring Meeting (May)
 - National Conference of Public Employee Retirement Systems (June)

- 2018 - National Association of State Budget Officers Spring Meeting (March)
 - Connecticut Conference of Municipalities (June)
 - International Pension and Employee Benefits Lawyers Association (June)
 - National Conference of Public Employee Retirement Systems (September)

- 2017 - University of Maryland - Cities that Cope: Confronting Financial Challenges in an Urban Landscape (March)

- 2016 - Standard and Poor's State and Local Government Credit Forum (December)
 - ICPM-CRR Discussion Forum (June)

- 2015 - Municipal Bond Buyers Conference
 - MAGNY Luncheon: Point/Counterpoint Debate, The Pros and Cons of Pension Obligation Bonds (April)

- 2014 - New Hampshire State Legislature – Subcommittee on Hybrid Plans (January)
 - 108th Government Financial Officers Association Annual Conference (May)
 - Massachusetts Municipal Association (June)
 - Morgan Stanley Investors Conference (September)
 - International Foundation of Employee Benefit Plans. Public Employee Policy Forum (September)
 - Multiemployer Academy of Actuaries (November)

- 2013 - 26th Legal Education Conference. National Association of Public Pension Attorneys (July)
 - Program for Advanced Trustee Studies. Pensions and Capital Stewardship Project, Labor and Worklife Program, Harvard Law School and National Conference on Public Employee Retirement Systems (August)
 - 63rd Conference of Consulting Actuaries (October)
 - State and Local Government Conference: As States Gain Momentum, Will Local Governments Be Left Behind? Session III: The Pension Vise - Is it Tightening or Loosening? Moody's Public Finance Group (November)

- 2011 - Meeting with the Service Employees International Union Public Sector Division leaders (February)
 - Annual Conference for the National Federation of Municipal Analysts (May)
 - Rappaport Institute for Greater Boston: Public Employee Pensions: Is the Current System Sustainable? (May)
 - OMNIREsearch / OMNIMACMEDIA 3RD Annual "Buttonwood Series" Investment Roundtable (July)
 - National Council on Teacher Retirement 11th Annual Trustees Workshop (August)
 - 8th Annual Public Pension Financial Forum (P2F2) (October)

2010 - National Bureau of Economic Research State and Local Pension Conference (August)

OTHER PROFESSIONAL SKILLS:

Coding Languages

Stata, VisualBasic, Matlab, R, Python

Microeconomic Datasets

Current Population Survey (CPS), Survey of Income and Program Participation (SIPP), Survey of Consumer Finances (SCF)

Macroeconomic Datasets

U.S. Census Bureau: Government Finances, U.S. Census Bureau: State & Local Public Employee Retirement Systems, U.S. Census Bureau: State & Local Public-Employee Retirement Systems, National Income and Product Accounts (NIPA), Standard & Poor's Compustat, Public Plans Database (PPD), Form 5500, Federal Flow of Funds