



Annuity Research Opportunities Call for Applications

Applications due September 17, 2021

The University of Wisconsin-Madison [Center for Financial Security's](#) (CFS) is an interdisciplinary research center providing mentored fellowships in the field of financial capability, household research as well as retirement and disability research. In partnership with the [Retirement Income Institute \(RII\)](#), part of the Alliance for Lifetime Income (ALI), CFS will fund two opportunities, both starting in October 2021. Scholars may apply to both. Junior scholars are strongly encouraged to apply.

Annuity Fellow

This part-time fellowship will start no later than October 4, 2021 and conclude by December 31, 2021. The Annuity Fellow will develop:

- Materials that promote awareness and understanding of annuities with the intent to promote annuities research. Specifically the fellow will create a set of instructor materials, which should include readings and presentations (slides or recorded videos) that help scholars and emerging researchers understand the basics of annuities and annuity research within household finance.
- Materials that build on an existing bibliography compiled by RII, and which may help augment the bibliography. The fellow can incorporate RII Insights, literature reviews, essays and scholarly papers where useful.
- Materials that identify and detail datasets that include variables related to annuities, which researchers can use to conduct research studies. These resources will include insights about accessing and working with data around annuities, including proprietary data from industry.

These instructional content and web materials, meant to advance research on annuities, will be developed with CFS mentorship, and made publicly available on the CFS website. The stipend for the Annuity Fellowship is \$7500.

The ideal candidate will have a strong foundation in the social sciences and advanced communication skills. Graduate students or junior faculty from historically marginalized groups are especially encouraged to apply. **To apply, submit your application, writing sample, CV and cover letter describing your interest [here](#).**

Note: scholars can apply to both opportunities. If you choose to apply to both, be sure to complete both applications.



Annuity Research Awards

There are two \$5000 research awards available for projects beginning in October 2021 and concluding with a paper in July 2022. The research awards will expand the network of emerging researchers studying annuities, especially junior scholars and researchers from marginalized groups. The research awards will fund projects examining income security, annuities, fixed income and/or pensions. Awardees will have opportunities to connect to Alliance for Lifetime Income member organizations.

An ideal candidate will have a strong foundation in the social sciences, advanced communication skills, and an advanced degree (doctoral student, recent PhD, postdoc, junior faculty). Researchers from historically marginalized groups (including underrepresented racial groups, first generation college students and other groups) are especially encouraged to apply.

To apply, submit a 3-page proposal for a research project that addresses income security, annuities, fixed income and/or pensions. Your proposal should include a specific research question and the proposed data to answer the question(s) that will be the focus of your work. Applicants should describe their experiences working with data in applied research. Specifically your research prospectus will need to include at least the following:

- Proposed Project Title
- Abstract
- Brief background on the proposed topics
- Research question(s) to be explored, how they connect to income security, and significance of your research
- Proposed data sources, methods section and discussion of the techniques you will use in your analysis to answer the central research question(s)
- Evidence of your experience working with data in applied research
- The relevance of your research for the field, for policy makers, and for the public

To apply, submit your application, writing sample, CV and cover letter describing your interest [here](#).

Note: *scholars can apply to both opportunities. If you choose to apply to both, be sure to complete both applications.*