

## **The Evolution of U.S. Firms' Retirement Plan Offerings**

Closed to further applications

**Faculty Member:** [Cormac O'Dea](#)

This project is eligible for remote work.

### **Proposal Description:**

We are creating a new data set of employer-sponsored retirement plans by codifying the information contained in the auditors reports that all US firms with more than 100 employees are obliged to submit. Many features of this important benefit (e.g. match rates, non-elective contributions, vesting schedules and loan-availability) are contained only as a narrative description, buried among lots of other text. Our long term goal is to match 20 years of firm-level plan data to employer-level data to study a number of questions regarding how employees make their savings decisions and how firms structure their retirement plans.

### **Requisite Skills and Qualifications:**

Applicants are required to have prior research experience with working with Form 5500 Regulatory Filings.

**Award:** Rosa Kleinman

Albert Gong

Jun-Davinci Choi

**Tobin Application Link:** [Tobin Application](#)

**Project Type:** Tobin RA

**Project Year:** 2020

**Term:** Fall 2020

**Source URL:** <https://economics.yale.edu/undergraduate/tobin-ra/fall-2020/evolution-us-firms-retirement-plan-offerings>