

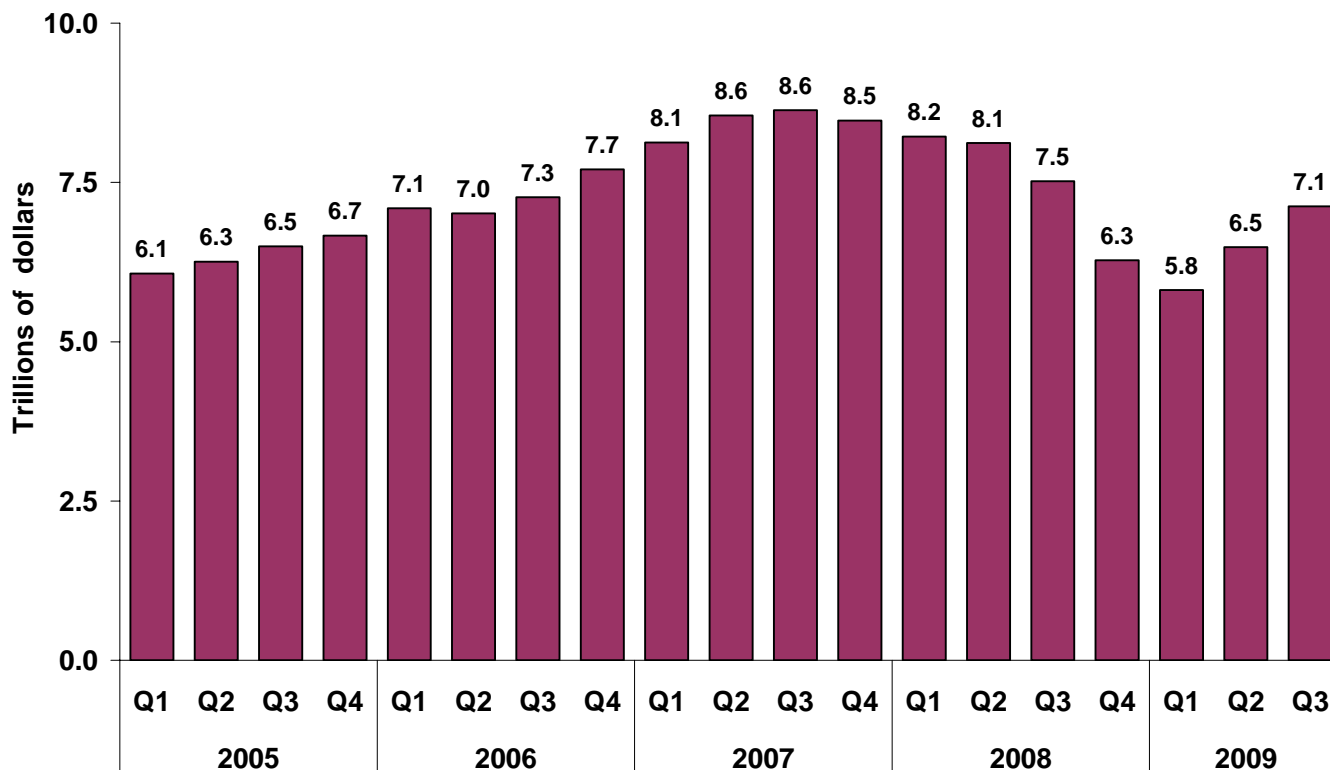


Retirement Account Balances

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Accumulations in Retirement Accounts, 2005 to 2009



Source: Authors' calculations using the 2009 Flow of Funds Accounts of the United States and the Russell 3000 Index.

Note: The chart shows balances at the end of each quarter in current year dollars.

Key Points

- Assets in retirement accounts (defined contribution plans and IRAs) exceeded \$8.6 trillion in the third quarter of 2007. By the end of the first quarter of 2009, when the stock market bottomed out, retirement accounts had lost \$2.8 trillion (33 percent) of their peak value.
- Since then, account balances have rebounded sharply. The most recent data show that retirement accounts gained roughly \$1.3 trillion (23 percent) since the first quarter of 2009, ending the third quarter at around \$7.1 trillion.
- Although current retirement account assets remain 17 percent below their peak value in 2007, they are above their 2005 value and near their 2006 value.

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