

2021 Retiree Insights Program

Greenwald Research's 9th annual multi-sponsor research program provides a comprehensive, in-depth understanding of the investment-related needs, concerns, and preferences of pre-retirees, retirees, and the financial professionals who serve them. Our iterative approach provides sponsors with actionable information and insights that can inform strategies, marketing materials, and thought leadership on a wide variety of issues. A new emphasis on trended data will leverage the eight prior years' worth of research findings to track changing perspectives and reactions to an ever-changing investing environment.

Key issues to be addressed by this year's research:

- The impact of the COVID-19 crisis on views towards investing, financial products, financial security, and preparation for retirement
- Assessment of the current investment climate, including interest rates, market volatility, and outlook
- Concerns around inflation, job loss, a market downturn, and an economic recession
- Appeal of retirement planning strategies, solutions, and guaranteed income streams
- Relationship with financial advisors and plan providers
- Role and expectations of financial services companies



March
Kick-off

April–July
Quantitative
Surveys

August–October
Focus Groups

November
Sponsors' Forum

This project's research agenda will consist of four phases, plus a Sponsors' Forum:

Phase 1 Survey of 1,000 consumers ages 50–70 with investable assets of at least \$200,000 and no current or expected pension income

Phase 2 Survey of 300 financial advisors from a mix of channels who derive at least 40% of their income from individuals ages 50–70

Phase 3 Four online consumer focus groups—two of retirees and two of pre-retirees—with the same population as phase one

Phase 4 Two online focus groups of financial advisors

Sponsors' Forum At the conclusion of the research, Greenwald will hold a Sponsors' Forum for an extensive presentation and discussion of results.

What Sponsors Receive

- Input on all phases of research
- Detailed reports on each phase that include key findings, interpretations, and recommendations
- Data tabulation books and data files
- Customized webinar or in-person presentation of results
- Opportunities to share in media and industry attention

Cost: **\$18,000**

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For additional information on the study design or sponsorship, contact **Matt Greenwald** at mathewgreenwald@greenwaldresearch.com