

# 2021 In-Plan Insights Program

Greenwald Research's newest multi-sponsor study will bring focus on opportunities in the retirement plan market, including in-plan retirement income solutions, accumulation investment options, and strategies. Through insights from plan participants, plan sponsors, and plan advisors, this research study will explore the changing landscape of retirement planning and the role of the workplace.

## Key issues to be addressed by this research:

- In-plan investment options, including those designed to produce steady income in retirement
- Views on retaining plan assets in the plan after retirement
- Awareness and reaction to the SECURE Act
- Approaches to addressing financial wellness at work
- The role of retirement saving and retirement income
- Resources that participants and sponsors value
- Identification of critical gaps between plan sponsors and plan participants on these topics



## This project's research agenda will consist of four phases:

**Phase 1 Phase One:** Two online focus groups of plan participants

**Phase 2 Phase Two:** Six IDIs with plan sponsors and six IDIs with plan advisors

**Phase 3 Phase Three:** Survey of 500 retirement plan sponsor decision-makers

**Phase 4 Phase Four:** Survey of 1,000 plan participants



## Audiences to be Studied:

- **Plan Participants:** Full-time workers, participating in a defined contribution retirement plan, and have at least \$50,000 in household income
- **Plan Sponsors:** Defined contribution retirement plan decision-makers at organizations with at least 50 employees
- **Plan Advisors:** Financial advisors who generate at least half of their income from their work with defined contribution retirement plans

## 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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research

For additional information on the study design or sponsorship, contact **Lisa Greenwald** at [lisagreenwald@greenwaldresearch.com](mailto:lisagreenwald@greenwaldresearch.com)