

2022 In-Plan Insights Program

Now in its 2nd year, Greenwald Research's multi-sponsor study will bring focus on opportunities in the retirement plan market for in-plan retirement income solutions and strategies. Through insights from plan participants, plan sponsors, and plan advisors, this research study will explore the changing landscape of retirement income planning and the role of the workplace plan.

Key issues to be addressed by this research:

- In-plan income options, including those with and without GLI
- The role of TDF and Managed Accounts in retirement income
- Views on retaining plan assets in the plan after retirement
- Views of SECURE Act, reaction to income disclosures and information still needed
- Planning programs 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* Online focus groups with plan participants
- Phase 2* In-depth interviews with plan sponsors and plan advisors
- Phase 3* Survey of 500 retirement plan sponsor decision-makers
- Phase 4* Survey of 1,000 plan participants

Audiences to be studied:

- **Plan Participants:** Full-time workers, participating in a DC retirement plan, and have at least \$50,000 in personal 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
- Individual sponsor webinar or presentation of results
- Opportunities to share in media and industry attention

Cost: \$19,500

Early Bird Pricing (Sponsor by 2/28/2022): \$18,000

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