

2023 Retiree Insights Program

Greenwald Research's annual multi-sponsor retirement research program provides a comprehensive, in-depth understanding of the investment and planning issues and needs of pre-retirees, retirees, and the financial professionals who serve them. Our iterative approach provides actionable insights that can inform strategies, marketing, and thought leadership. The study, now in its 11th year, will leverage findings from prior years to examine the ever-changing investing environment.

Strategic Focus on Investing, Planning, and Taking Income

- Assessment of the current investment environment, including inflation expectations, historically high stock market valuations, and low interest rates
- What strategies are utilized for saving, planning, and taking retirement income in reaction to this climate
- How are shifts in the nature of work impacting the transition to retirement
- How are consumers planning for their desired retirement lifestyle and the associated costs
- Focus on what has changed in the last 10 years around retirement concerns and feelings of security
- Changes in retirement expectations, views of the market, and planning approach coming out of a turbulent year

March
Kick-off

April–July
Quantitative
Surveys

August–October
Focus Groups

November
Sponsors' Forum

A FOUR-PHASE RESEARCH PROGRAM



Phase 1: Survey of 1,000 consumers ages 50–70 with investable assets of at least \$200,000 and no 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

What Sponsors Receive

- Input on all phases of research
- Detailed reports on each phase, including key findings, implications, and recommendations
- Data tabulation books and data files
- Sponsors' Forum to include an extensive presentation and discussion of results
- Customized presentation of results
- Opportunities to share in media and industry attention
- Ability to use data in marketing, reports, and other materials

Cost: \$19,500

Early Bird Pricing (Sponsor by 2/28/2023): \$18,000

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