

2024 In-Plan Insights Program

Now in its fourth 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 Address:

- 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
- How plan advisors can shift from cog to catalyst in driving adoption and utilization.
- Planning programs that participants and sponsors value
- Identification of critical gaps between plan sponsors and plan participants on these topics

Audiences to Study:

- **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

A FOUR-PHASE RESEARCH PROGRAM



Phase 1: 2 Online focus groups with plan participants



Phase 2: 6 In-depth interviews with plan sponsors and 6 with plan advisors



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



Phase 4: Survey of 1,000 plan participants

April
Kick-off

June
Online Focus
Groups

July
In-Depth
Interviews

August–October
Quantitative
Surveys

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 2/29/2024): \$18,000

 **greenwald**
research

For additional information on the study design or sponsorship, contact
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