

# 2025 In-Plan Insights Program

Now in its fifth year, this multi-phase research program 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 program will explore the changing landscape of retirement income planning and the role of the workplace plan.

## Key Issues to Address:

- Appeal of in-plan income options, including those with and without GLI
- The role of TDFs and Managed Accounts in retirement income
- Views on retaining plan assets in the plan after retirement
- Identifying obstacles to sponsors and advisor/consultants and how to overcome them
- Retirement income communication and participant journey
- Impact of terminology, language, and messaging

## 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

**Aug-Oct**  
Quantitative  
Surveys

**Nov-Dec**  
Results &  
Read-Outs

## 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 1/31/2025): \$18,525**

**greenwald**  
research

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