

2025 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 research program, now in its 13th 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 and expectations about inflation, the market, and interest rates
- Strategies utilized for saving, planning, and taking retirement income in reaction to this climate
- Continued tracking of the way AI and technology can play a role in the delivery of financial advice
- How shifts in the nature of work impact the transition to retirement
- How consumers are planning for their desired retirement lifestyle, when that planning happens, and how to promote better planning
- What financial professionals need to better serve their pre-retiree and retiree clients



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


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Discounts are available for companies sponsoring multiple syndicated studies.

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