

2026 Retiree Insights Program

Greenwald Research's annual multi-sponsor retirement research program provides a comprehensive understanding of pre-retiree and retiree investment and planning issues, and views from the financial professionals who serve them. The research program, now in its 14th year, will leverage findings from prior years to examine the ever-changing investing environment.

KEY ISSUES TO ADDRESS

- 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 SPONSORS RECEIVE

- All-sponsor kick-off discussion
- Input on questionnaires
- Data tabulation books and data files
- Detailed reports that include key findings, interpretations, and recommendations
- All-sponsor Forum to hear and discuss findings
- Opportunities to share in media and industry attention

TIMING

All-Sponsor Kick-Off*	May
Research Development & Execution	June-July
Analysis & Reporting	August
All-Sponsor Forum	September

TWO
Surveys

ONE
Price!

Consumer Survey:

Survey of 1,000 pre-retirees and retirees ages 50–70 with investable assets of at least \$200,000 and no pension income

Advisor Survey:

Survey of 300 financial advisors from a mix of channels who derive at least 40% of their income from individuals ages 50–70

SPONSORSHIP

Early Bird (By March 31, 2026): \$23,000*

Individual Company Presentation: \$1,000

After March 31, 2026: \$25,000

Custom Presentation Deck: \$3,000

**The study will only proceed and kick-off in May if we have at least 5 sponsoring companies by March 31st*

FOR ADDITIONAL INFORMATION:

www.greenwaldresearch.com/retireeinsights

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