

How can your organization improve worker confidence in their financial security through retirement?

(Hint: Employer-sponsored retirement and financial wellness programs play a critical role).



The Employee Benefit Research Institute and Greenwald Research present the annual Retirement Confidence Survey.

The Retirement Confidence Survey gauges the views and attitudes of working-age and retired Americans regarding retirement, their preparations for retirement, their confidence with regard to various aspects of retirement, and related issues. The survey is the longest-running survey of its kind (over three decades in the field!) and is conducted annually by the Employee Benefit Research Institute and the independent research firm Greenwald Research. Each year, the survey features a unique deep dive into a specific cohort of workers and retirees; past oversamples include the African American, Hispanic American, LGBTQ, and caregiving populations.

As an official survey partner, your organization will be invited to:

- ✓ Participate in the development of the survey questionnaire.
- ✓ Take part in market research readout sessions.
- ✓ Access raw data for corporate insight and analysis.
- ✓ Receive comprehensive survey results including underlying data.
- ✓ Become an industry leader and spokesperson by joining conference panels and webinars.
- ✓ Utilize survey results for marketing and communications program efforts.
- ✓ Enjoy the recognition with an extended earned and paid news media outreach along with social media campaigns that are valued in excess of \$150,000.

Past survey partners include American Century, American Funds/Capital Group, Ameriprise Financial Inc., Ayco, Bank of America, BlackRock, Ameriprise (Columbia Threadneedle), Empower Retirement, Fidelity Investments, FINRA, Human Rights Campaign, Jackson, JP Morgan Chase Co., LGIMA, Mercer, Mutual of America, NEFE, Nationwide, New York Life, PIMCO, Principal Financial Group, Prudential Financial, Retirement Clearinghouse, T. Rowe Price, and US Chamber of Commerce.

Contact Masha Romanchak at Romanchak@ebri.org or (202) 775-6360 to become a partner today. Sign up by fall to take full advantage of partnership!

Timeline:

Fall — Kickoff

Winter — Fielding & Analysis

Spring/Summer — Survey Findings Campaign

“ Adequately preparing for retirement during working years is essential for strong retirement confidence later in life.

— Craig Copeland, Ph.D.,
Employee Benefit Research Institute ”

Become a Retirement Confidence Survey Partner Today!

Tax-Deductible Contribution:
\$13,500.

This survey is sponsored by the Employee Benefit Research Institute Education and Research Fund, a 501(c)(3) nonprofit organization.

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