Retirement Industry Research: Insights for Plan Sponsors

Episode 40

In episode 40 of *Revamping Retirement*, Jennifer Doss and Scott Matheson are joined by Shawn O'Brien, associate director of retirement research at Cerulli Associates, a strategic consulting and market research group focused on the financial services industry.

With extensive research across industry stakeholders—from plan sponsors and participants to recordkeepers and asset managers—Shawn shares Cerulli's latest insights on key topics like the adoption of environmental, social, and governance (ESG) investing in retirement plans, plan sponsor reaction to inflation, and the prevalence of managed accounts. He also discusses what he considers to be the biggest disconnect between the demand and supply sides of the industry.

Later, Mike Webb provides an overview of the taxation of Roth distributions in *Minute with Mike*.