



Episode 61: Caregivers and Retirement Readiness with Greenwald Research

Episode 61

This month on *Revamping Retirement*, Dawn McPherson and Matt Patrick talk with Lisa Greenwald, CEO of [Greenwald Research](#). The three discuss the impact of caregiving responsibilities on retirement readiness. Lisa highlights that caregivers face unique challenges that often aren't addressed by employers and benefits providers, such as reduced work hours, job changes for flexibility, and financial strain. The episode also covers the landscape of retirement benefits more broadly, including trends to expand offerings for employee well-being, such as mental health and financial wellness programs.

Later, Mike Webb talks about plan fees in this month's *Minute with Mike*.

Subscribe to [Revamping Retirement](#) for more episodes with insights for plan sponsors.

Last Month's Episode: [Episode 60: Plan Sponsor Predictions for 2024](#)

Legal Notice

This material is intended to be informational only and does not constitute legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes. It may not apply to all investors or all situations and is not a solicitation or an offer to buy any security or instrument or to participate in any



trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2026 CAPTRUST Financial Advisors