



Thursday, May 12, 2022

Retirement Industry Research: Insights for Plan Sponsors

We explore some of the key trends affecting the retirement plan marketplace from the unique vantage point of Shawn O'Brien. As the associate director of retirement research at Cerulli Associates, a strategic consulting and market research firm focused on the financial services industry, Shawn's research spans the supply and demand spectrum—from participants and plan sponsors to recordkeepers and asset managers.

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*.

Episode 40

Author(s)



Jennifer Doss, CRPS®, QKA

<https://www.captrust.com/people/jennifer-doss/>



Scott T. Matheson, CFA®, CPA

<https://www.captrust.com/people/scott-t-matheson-2/>



Michael A. Webb, CEBS

<https://www.captrust.com/people/michael-a-webb-cebs/>

Legal Notice

This document is intended to be informational only. CAPTRUST does not render 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 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.

© 2022 CAPTRUST Financial Advisors