

## A game changer



Want to save time and money?

Our strategic outsourcing solutions can be a real game changer for your pension plan administration. [Watch the video and learn more>](#)

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### New Options for Non-Union Members

When one of our clients needed to reduce pension liabilities and costs for current and future non-union employees, we were able to craft an innovative plan design that worked for everyone. [Read our case study>](#)

### DB Plan Sponsors Preparing for PRTs

The most common preparatory steps taken include an evaluation of the financial impact of a pension risk transfer; discussions with stakeholders; data review/cleanup; and, exploration of the PRT solutions.

[Read more>](#)

### Closed DB Plan Nondiscrimination Relief Extended Further

The Internal Revenue Service (IRS) has issued **Notice 2017-45**, which extends the temporary nondiscrimination relief for closed defined benefit (DB) plans that is provided in Notice 2014-5, by making that relief available for plan years beginning before 2019 if the conditions of Notice 2014-5 are satisfied.

[Read more>](#)

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### "How Do I Protect My Child's Inheritance?"

As seen in Capital Ideas. Our own Kathryn Pizzi, managing director, investment advisory, weighs in on the toughest question she's received in her career as an advisor. [Read more>](#)

### Fiduciary Education is Key for Plan-Sponsor Investment Committees

The word "fiduciary" is no longer quaint financial jargon for most plan sponsors. Due to regulatory changes over the past several years and attention surrounding the new Labor Department conflict-of-interest rule for plan advisers, the term and its requirements are now very much on the minds of most plan-sponsor

investment committee members. [Read more>](#)

## Thought Leadership: One Size Does Not Fit All

Selecting an investment to serve as a plan's qualified default investment alternative (QDIA) is a fiduciary action for which plan sponsors frequently look to their advisers for help. [Read more>](#)



## 5 Ways to Make 401k Portability a 2018 Priority

It's widely-accepted that retirement savings portability has proven to address the small account problem for 401k plan sponsors, as well as preserve participants' savings currently lost to cash-out leakage. [Read more>](#)

## IRS Reminds 403(b) Plan Sponsors of Common Plan Errors

In an updated page on its website, the Internal Revenue Service (IRS) has listed common 403(b) plan mistakes, IRS services, products and assistance to help 403(b) plan sponsors stay in compliance. [Read more>](#)

## Roth 401(k) Option Availability Increases With Company Size

The Roth 401(k) that allows participants to make contributions on an after-tax basis while allowing for tax-free withdrawals is increasing in popularity, with large employers taking the lead, according to a new survey by Transamerica. [Read more>](#)

## Newsorthy notes



### Sharing our expertise:

- **Stuart Herskowitz**, senior vice president of client relations and **Rodger Metzger**, president and chief investment officer, investment advisory, will be sharing their knowledge of financial wellness and Wall Street updates to a group of HR professionals at the Financial Services Consortium on September 22nd, sponsored by Learning Dynamics.

We have partnered with Employers Association of the Northeast to host a FREE Lunch & Learn on October 18th. Join us to discover how your business can implement strategies to reduce its unemployment costs. To learn more or register, visit [www.eane.org](http://www.eane.org).

### In our communities:

To stay current with the ever changing pension market, **Steve Lemanski**, consulting actuary, recently attended PERAC's Emerging Issues Forum and the New England GFOA fall conference.

There's still time! Join Hooker & Holcombe and "Team Fidelco" at the Eversource Hartford Marathon scheduled for October 14. Whether you're an avid runner or prefer to walk, the marathon offers an opportunity for families, businesses, charities and volunteers to come together in an inspiring display of community spirit. [Click here](#) to register.

We were proud to support the following September events:

- The City of Middletown's annual Mayor's Ball
- The Master's School Golf Classic