

h&hSM

hooker & holcombe



The elements of success

At Hooker & Holcombe, we are well positioned to combine each of these elements to help your business meet its goals and look to the future. Whether it involves restructuring a pension, creating an investment strategy or modernizing a 401(k) or 403(b) plan to achieve maximum participation, our innovative solutions, creative professionals and leading-edge technology are the fundamentals to realizing results.

Our Approach

It's elemental: we're inventive, hands-on, focused and deliberate. The basis of our success lies in the depth of our experience and the tenacity of our seasoned professionals, supported by robust technology and detailed, proven processes.

About Us

Hooker & Holcombe opened its doors in 1956 as a full-service pension and actuarial consulting firm. Today, through our subsidiary companies – Hooker & Holcombe Investment Advisors, Inc. (HHIA) and Hooker & Holcombe Retirement Services, Inc. (HHRS) – we offer public and private businesses an array of retirement planning and investment advisory consulting services for all types of employer-sponsored plans. Additionally, individual wealth management services are offered through Hooker & Holcombe Investment Advisors, Inc.

Our reputation for integrity combined with our ability to deliver outstanding consulting services has made us a regional leader in actuarial, retirement and investment advisory services. It has also resulted in hundreds of satisfied clients. Shouldn't you be one of them?

Actuarial Services



Hooker & Holcombe, Inc., founded in 1956, is a leading full-service consulting and actuarial firm focused on all types of retirement plans. We assist clients with both complex and routine matters that affect their qualified and non-qualified pension and retirement plans.

Our clients include:

- Corporations
- Municipalities
- Financial institutions
- Health care and other non-profit organizations
- Professional service organizations

Knowledge that only comes from experience

Over the years, H&H has built a reputation for integrity and the ability to deliver outstanding professional services. We preserve our reputation by delivering on this promise.

Areas of expertise:

- Actuarial consulting
- Traditional defined benefit plans
- Cash balance/hybrid plans
- Supplemental executive plans
- Post-retirement health benefits
- Pension outsourcing and administration
- PensionEdge® Plus – online administration tools

Defined Contribution Plans



Hooker & Holcombe Retirement

Services, Inc. specializes in a variety of defined contribution plans and associated services including:

- 401(a) and 401(k) plans
- 403(b) and 457 plans
- Executive non-qualified plans
- ESOPs
- Support to RIAs

Whether you are transitioning an established plan or implementing a new one, our highly experienced consultants will structure a cost-effective solution aligned with your goals.

PensionEdge® features:

- Nationally recognized mutual funds
- Trust services provided through Charles Schwab Bank or Mid Atlantic Trust Company
- State-of-the-art record keeping technology
- Compliance testing
- Full internet access
- Voice response
- Participant service center
- Participant education programs

Institutional Investment Advisory Services



Hooker & Holcombe Investment Advisors, Inc. was established to bring the skills and experience of investment professionals along with technology, data and analytical processes used by large institutional investors to the small- and mid-sized retirement marketplace.

Our consultants have the specialized knowledge and skills to assist Retirement and Pension Boards with their institutional investment responsibilities. We help clients carry out their fiduciary responsibilities and assist them to better manage their retirement funds through our expert advice.

Hooker & Holcombe Investment Advisors, Inc. is prepared to address every aspect of the investment process as it relates to:

- Defined benefit plans
- Defined contribution plans
- Executive financial planning
- Wealth management services
- OPEB trusts
- Foundation and endowment trusts

We focus on investment policy, asset allocation, investment selection, ongoing reporting and monitoring.





hooker & holcombe

65 LaSalle Road
West Hartford, CT 06107-2397

P: 860.521.8400

800.457.1245

F: 860.521.3742

hhconsultants.com

Investment advice is offered through Hooker & Holcombe Investment Advisors, Inc. ("HHIA"), an SEC Registered Investment Adviser.