

Meet Our Newest Retirement Expert

Focus will be on client relations and participant education services



Hooker & Holcombe is pleased to welcome Peter Ganey to the firm as senior client relationship manager. He has more than 23 years of experience in the retirement services industry and is responsible for ensuring superior service and relationship development at the client level, serving as liaison between the firm and its clients, fostering existing relationships and providing guidance on defined contribution plans. [Read full bio](#)>



"Important information for plan sponsors filing determination letters."

- Steve Lemanski, FSA, FCA, MAAA
Consulting Actuary
Actuarial and Benefits Consulting

DB Determination Letters Must Include Risk Transfer Info.

The Internal Revenue Service (IRS) has said applicants requesting determination letters for their defined benefit (DB) plans should identify whether the plan has lump-sum risk transfer language in either the cover letter to their application or an attachment. [Read more](#)>



"An interesting roundtable discussion about target date funds."

- Rodger Metzger, CFA
President, Chief Investment Officer
Investment Advisory

Constant vigilance-What should plan sponsors think about?

In this brief video, John Croke, head of Multiasset Product Management, addresses several current topics and trends facing today's target-date fund (TDF) managers, including the appropriateness of target-date versus managed account platforms and the challenges involved in integrating annuities within plans. [Watch video](#)>



"Insightful study highlighting the importance of employer-sponsored financial education within the workplace."

- Peter Ganey
Senior Client Relationship Manager
Retirement Services

Financial Education Improves Retirement Savings.

Employees with access to financial and retirement education have less stress, more savings

and more confidence than those without access, a Ramsey Solutions survey found.

Read more>



"Learn more about proposed updates to this government reporting for qualified plans."

- Timothy Ryor, FSPA, FCA, MAAA
Senior Vice President and Consulting Actuary
Actuarial and Benefits Consulting

Form 5500 Annual Report Modernization Proposed.

The U.S. Department of Labor's (DOL) Employee Benefit Security Administration (EBSA), along with the Internal Revenue Service (IRS) and the Pension Benefit Guaranty Corporation (PBGC) are seeking public comments on proposed revisions to modernize and improve the Form 5500 Annual Return/Report filed by private-sector employee benefit plans. **Read more>**

A look back in time...July 1956



Celebrating the past.
Envisioning the future.

- Dick Clark first appeared as host of American Bandstand
 - The US motto "In God We Trust" was authorized for use
 - American actor Tom Hanks born in Concord, CA
 - Olympic gold medalist Dorothy Hamill born in Riverside, CT
 - Last Ringling Bros., Barnum & Bailey Circus held under a canvas tent
 - Italian liner Andrea Doria sinks after colliding with the Stockholm
 - The S&P 500 closed at \$46.97, compared to approx. \$2,098.86 today
 - 650,000 U.S. steel workers go on strike
 - Average cost of a gallon of gas was 22 cents
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