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DB Plan Providers Still Investing in Innovation

Hooker & Holcombe experts, Richard Sych, president and consulting actuary, and Timothy Ryor, senior vice president and consulting actuary, were recently interviewed and quoted by PlanSponsor magazine regarding service and technology trends in defined benefits. [Read more>](#)

GSAM Predicts a Break in Stagnant Pension Funding Levels

The firm says DB plan funded levels may be on the move as interest rates and equity values rise simultaneously. [Read more>](#)

DB Plan Clients See Lump Sum Favorability Shift

The IRS prohibits DB plans from paying lump sums to in-pay retirees and beneficiaries," but many terminated vested participants will view lump sums as attractive." [Read more>](#)

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DOL Moves Forward With 60-Day Fiduciary Rule Delay

The Department of Labor (DOL) has announced that it is delaying the implementation of the fiduciary rule and related exemptions, including the Best Interest Contract (BIC) exemption, by 60 days. [Read more>](#)

Top Five Trade Issues Investors Should Be Watching

Developments that may impact the flow of the world's goods and services across borders can have a big impact on the world economy and the earnings of global companies. [Read more>](#)

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Why Restricting 401(k) Loans Lead to Better Participant Outcomes

Advisors would agree that too many Americans are using their 401(k) plan as a revolving line of credit and not as its intended purpose as a savings vehicle for retirement. Many participants who take loans are not facing foreclosure, shockingly high medical bills, a collapsed roof, or sudden death in the family. [Read more>](#)

Improving Employees' Retirement Readiness

For many people, there is a disparity between anticipated retirement income and expenses during retirement. And why is that? A recent blog post argues that what's behind it is another disparity - between the availability of retirement plans and participation in them. And one of the antidotes for that, it suggests, is participant education. [Read more>](#)

401(k) Nondiscrimination Tests Explained

Even though nondiscrimination testing is likely performed by a plan's recordkeeper or third-party administrator (TPA), plan sponsors need to understand the basics of the tests, including the types of contributions that are tested, the methods used and the consequences of failing. [Read more>](#)



Newsworthy notes



Sharing their expertise:

- **Timothy Ryor**, senior vice president, consulting actuary, and **Steve Lemanski**, consulting actuary, will discuss municipal pension stats and strategies during the upcoming Actuarial Club of Hartford and Springfield meeting on May 16th.

- **Rodger Metzger**, president and chief investment officer, Investment Advisory, recently attended the 2017 Charles Schwab National Summit in Fort Lauderdale, FL.

- Rodger will also be attending the Global Agricultural Investment Seminar in New York City.

New employee:

- We are proud to announce **Nicole Rizzo** has joined our team as Service Center Administrative Assistant.