



Rodger Metzger, investment advisory president and chief investment officer, recently sat down with Mr. C., executive director of the S. Claus Foundation for Children, to discuss his investment returns and share his insights on the economy, politics and investments for the coming year. [Read full story>](#)

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'Off Budget' PBGC Premiums Viewed As Essential By DB Industry

Reintroducing a piece of legislation that would take Pension Benefit Guaranty Corporation (PBGC) premiums "off budget," meaning they would not be counted as an income stream going towards the federal government's general revenue, Senator Mike Enzi (R-Wyoming) says the move is necessary to protect the stability of the federally mandated insurance system for defined benefit (DB) plan sponsors. [Read more>](#)

Public Pensions Pushed Fees Lower, Improved Funding in 2016: Report

Public pension funds achieved lower investment and administrative expenses in 2016, according to an NCPERS study of 159 public funds. The funds decreased their fees by only 4 basis points; but this trend was coupled with another year of improved funding ratios. [Read more>](#)

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Catch the Wave and Learn to Save Webinar

America Saves Week is February 27 - March 3. Join our Wealth Management experts on March 1 for a 30-minute webinar to discover how creating a financial plan and investing wisely can help you achieve your savings goals. [Register now>](#)

Reenrollment: One year later

Reenrollment into low-cost target-date funds can be an effective way to improve plan diversification. Vanguard research has shown that most participants remained invested in the default fund in the months following a reenrollment. But what does this population look like after one year? [Read more>](#)

DOL Fiduciary Rule Developments Give Both Sides Something to Cheer

Opponents are almost certain to get a six-month delay in the rule's implementation date, but proponents

can take solace in the fact that rescinding or revising the rule won't be easy. [Read more>](#)

The logo consists of the letters 'R' and 's' in a white serif font, set against a red square background. This square is centered on a thick yellow horizontal bar that spans the width of the page.

Courage, not Literacy, Key to Financial Wellness

Employees with a more favorable self-rating of their financial knowledge were more likely to use financial wellness tools given to them by their employers. [Read more>](#)

House Passes Resolutions to Block State-Run Plans for Private Sector

The U.S. House of Representatives on Feb. 15 passed two resolutions of disapproval to block Department of Labor (DOL) regulations regarding state-run retirement plans for private sector workers. [Read more>](#)

2016 PLANSPONSOR DC Survey: Plan Benchmarking

Retirement plan participation and deferral rates both rose again, according to the 2016 PLANSPONSOR Defined Contribution (DC) Survey, as did the percentage of plans with immediate eligibility and immediate vesting. Some could argue that such changes are within the survey's margin of error, but the five-year trend for these values shows a growth rate that is unquestionably positive. [Read more>](#)



Newsorthy notes



Hooker & Holcombe Investment Advisers, Inc. has been named to *PlanAdvisers 2017 Top 100 Retirement Plan Advisers* list for the second year in a row. [See complete list>](#)

Sharing knowledge:

Two of Hooker & Holcombe's investment advisory experts were guest speakers at a recent CT CPA seminar. Kathryn Pizzi, managing director, wealth management, discussed the state of the municipal bond market and Arthur Meizner, director, investment consulting services, provided an update on the DOL Fiduciary Rule.

In the community - We are proud to be sponsoring the following events:

- South Nassau Communities Hospital Casino Royale Fundraiser on March 9
- Tri-State Society of Human Resources Management Conference in Newport, RI on March 10
- Johnny's Jog for Charity on March 17 in West Hartford