

QUARTERLY MARKET INSIGHTS

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Watch for our Q3 market outlook webinar coming in early October.

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FASB Changes

FASB has announced changes to the disclosure requirements for pension and other (OPEB) plans. Several items were removed; several were added. These changes are generally effective for 2021 (2022 for nonpublic entities), although earlier adoption is permitted. There are no changes in the methodology used to determine the benefit obligation or pension expense. [Read more>](#)

SOA Seeks Input on New Public Pension Mortality Tables

The SOA's public-sector mortality study is designed to provide public pension actuaries and plan sponsors with information to help set mortality assumptions and includes separate mortality tables for teachers, public safety professionals and general members, respectively. [Read more>](#)

Lowering Municipal Pension Costs Through Cash Balance Plan Design

Learn how we helped one CT town with this innovative alternative that would curb rising pension costs. [Read the case study>](#)

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New Legislation Modifying Hardship Withdrawal Rules

Earlier this year, the Bipartisan Budget Act of 2018 (BBA) introduced three changes to the provisions for hardship withdrawals, including some that affect plans that follow the safe harbor rules. The changes are designed to ease restrictions for participants who need to access their qualified retirement plan assets because of an immediate financial need. [Read more>](#)

Using 'Value of Investment' to Measure Financial Wellness Programs

In a new report, "Measuring the Value of Your Financial Wellness Investment," MetLife discussed how employers can gauge the success of their financial wellness programs. [Read more>](#)

Why Recordkeeping Pricing Is Different for 401(k)s and 403(b)s

The price of recordkeeping services is not uniform; it can vary depending on type of retirement plan. A blog entry discusses why pricing for 401(k)s is different from that for 403(b)s. [Read more>](#)

What Employees Actually Want from Workplace 401k Wellness Programs

It's common knowledge by now: workers are stressed about finances and it's affecting their work performance. [Read more>](#)

What Employers Must Know About the IRS Rule Tying Student Loans, 401(k)s

For employees faced with significant student loan debt - and there are a lot of people in that category - the idea of putting aside part of their paycheck to save for retirement has typically been a very distant second priority. But now that could be changing, after a landscape-altering ruling from the Internal Revenue Service.

[Read more>](#)

Newsworthy notes



New Employees:

We are pleased to announce two additions to the firm's Actuarial Services Group. Kelsey Neligon has joined as pension analyst and Kathryn Toyota has joined as actuarial student.

We are proud to support these upcoming events:

- West Hartford Chamber of Commerce golf tournament
- Wheeler Clinic's 'Farm to Table' gathering
- Connecticut Children's Medical Center Gala