

PLEASE JOIN US:

SECURE Act Seminar

Wednesday, March 4, at 8:00 a.m.

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PBGC Corrects, Clarifies and Improves Various Regulations

The Pension Benefit Guaranty Corporation (PBGC) has issued a final rule that makes technical corrections, clarifications and improvements to a variety of its regulations. The changes are part of the agency's ongoing retrospective review of the effectiveness and clarity of its rules; they also result in part from input the PBGC has received. [Read more>](#)

Corporate Plan Funding Ratios Up In Fourth Quarter – 2 Reports

The average U.S. corporate pension plan funding ratio increased over the fourth quarter due to market movements, two reports estimate. [Read more>](#)

Mechanics of DB Plan QDROs Differ From Those for DC Plans

There are requirements for a qualified domestic relations order (QDRO) that apply whether the QDRO is for splitting up defined contribution (DC) plan assets or defined benefit (DB) plan assets, notes Lisa Loesel, partner at McDermott, Will & Emery in Chicago. [Read more>](#)

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Steps for Creating an Effective IPS

Though there is no legislation or regulation that requires retirement plan fiduciaries to have an investment policy statement (IPS), it is widely considered a best practice. [Read more>](#)

Have CITs in 401(k) Plans Reached a Tipping Point?

Collective investment trusts (CITs) have long been heralded as “the next big thing” in the DC industry, but a new report suggests that, in recent years, the market has turned a corner. [Read more>](#)

Financial Wellness Programs Can Benefit the C-Suite Too

There is a misconception that financial wellness services are not needed by high-earning employees, but that couldn't be further from the truth. [Read more>](#)

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The New Age of 401k Plan Portability

A recent survey of defined contribution (DC) plan sponsors found that interest in retaining assets for retirement is on the rise. That finding, paired with certain provisions of the SECURE Act of 2019, suggests that DC plans are on a path to becoming “decumulation vehicles” for American retirees. [Read more>](#)

Your Role as a Fiduciary, Simplified

Fiduciary responsibilities are both important and complex. Our guide '**Your role as a fiduciary**' will help you better understand this important function and the actions needed to remain compliant with your fiduciary duties.

Read more>

Is the Adoption of Innovative Plan Features Finally Leveling Off?

After years of steady increase, according to PSCA's 62nd Annual Survey of Profit Sharing and 401(k) Plans, the longest running survey of its kind, plan sponsor adoption of automatic enrollment features, Roth options, and target-date funds may be leveling off. **Read more>**



Newsorthy Notes

Sharing our expertise

Two of the firm's Investment Advisory Group professionals, Pamela Minish, managing director, and Brenda Bachman, retirement plan education specialist, will discuss how employee financial wellness benefits both the employee and company at the CBIA 2020 Human Resources Conference on March 26th. **Register today>**

Company recognition

Hooker & Holcombe is honored to be named a finalist on the Hartford Business Journal's listing of '2020 Best Places to Work in Connecticut'. **Read full article>**



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