



Simplifying Pension Administration

Connecting your organization to pension technology and resources.

Since 1956, Hooker & Holcombe has been delivering cost-effective and innovative pension and actuarial consulting solutions for non-profits, corporations, and municipalities located throughout the Northeast.

Today, we're a leading provider of pension and actuarial services, institutional investment advisory, retirement plan consulting and individual wealth management planning.

Pension Outsourcing

Now, your organization can take advantage of our years of experience in retirement consulting with Pension Outsourcing. An innovative approach that helps plan sponsors better manage their retirement plans by choosing only the level of service they need. Whether you're looking for basic online viewing rights, more advanced features such as online benefit calculations, or the efficiency of a full-service model that lets us manage your complete program, we have a solution that is right for your organization.

Pension Outsourcing is driven by PensionEdge® Plus, a fully customizable, paperless portal that gives plan sponsors control over plan data. Using secure technology, plan sponsors can view all participant transactions in one location, plus quickly query reports.

Self-service benefit projections and other administrative duties previously routed through your Human Resources Department can now be completed by participants online, quickly and easily.

PensionEdge® SERVICE CENTER

Providing essential support is also a key element to giving plan participants access to information. In addition to online tools, participants can get help with password resets and web navigation from our PensionEdge® Service Center. Depending on the level of service selected by our client, our knowledgeable PensionEdge® Service Center representatives assist participants with questions about their benefit estimates, completing and processing retirement packages, and other required forms.

PensionEdge® Plus provides a single source of data with seamless reporting, robust reports, integrated valuation data, and paperless documents that can be archived and retrieved. Pension Outsourcing provides a comprehensive end-to-end solution for busy plan sponsors. Together, they simplify plan administration.

PensionEdge® Plus features:

- Configurable data access
- Paperless documents
- Real-time benefit calculations
- Online newsfeed and communications
- Worktrack—an online assistant that provides you and your staff with maximum efficiency
- Software as a solution (SaaS) and SSL encryption ensures complete data integrity
- No hardware or software to purchase
- Dynamic reporting



Four service levels let you choose the right model for your needs.

Each model provides you with a different set of options ranging from basic viewing rights to full service outsourcing.

Additional services such as mailings, person locator and retiree death audit services, on-site education and other administrative options are also available.

Pension Outsourcing, backed by the power of PensionEdge® Plus, gives plan sponsors and participants the edge they need to take charge of their pension information—quickly, easily and efficiently.

If you're looking to ease the burden of managing your organization's pension plan while providing your participants with maximum convenience, talk to Hooker & Holcombe today.

	Basic	Premier	Premier Plus	Comprehensive
PensionEdge® Plus Portal Features				
View annual participant benefit statement	●	●	●	●
View documents	●	●	●	●
Add documents		●	●	●
View census data		●	●	●
Sponsor access Benefit Estimate Calculator		●	●	●
Participant access Benefit Estimate Calculator			●	●
Sponsor access Final Benefit Calculation		●	●	
Sponsor access Final Benefit Calculation and full benefit package request				●
Participant access Final Benefit Calculation and full benefit package request (Premium Plus: email to sponsor for completion, Comprehensive: email to H&H for completion)			●	●
Sponsor access Worktrack		●	●	●
Sponsor access standard reports and data worksheets		●	●	●
Participant Data Maintenance				
Annual census data update	●	●	●	●
Quarterly or monthly census data updates through regular payroll data feeds				●
Sponsor online participant data maintenance		●	●	●
Benefit Package & Payment Process				
Sponsor prepares (using sponsor calculation), mails, collects, audit review & follow-up	●			
Sponsor prepares (using DB PEP calculation), mails, collects, audit review & follow-up		●	●	
H&H prepares (using DB PEP calculation and sponsor approval via Worktrack), mails, collects, audit review & follow-up				●
Sponsor submits to Custodian	●	●	●	
H&H submits to Custodian				●
Sponsor reconciles distributions and repetitive benefit payments	●	●	●	
H&H reconciles distributions and repetitive benefit payments				●
PensionEdge® Service Center Assistance				
Assistance with login and web navigation	●	●	●	●
Assistance with employee requests for plan information				●
Assistance with address updates				●
Assistance with Benefit Estimate Calculator (Participant)			●	●
Assistance with Benefit Estimate Calculator (Sponsor)		●	●	●
Assistance with Final Benefit Calculation Request (Participant)				●
Assistance with Final Benefit Calculation (Sponsor)			●	●
Assistance with forms completion				●
Assistance with Payment Maintenance				●
PensionEdge® Plus Training				
Online Sponsor User Guide	●	●	●	●
Online Participant User Guide	●	●	●	●
On-site sponsor training		●	●	●

Additional services include:*

- preparation of final election packages
- on-site education
- participant mailings
- missing participant locator
- retiree death audits
- QDRO review/administration
- collection and storage of beneficiary forms
- custom reports and surveys

* Additional services are contracted on a hourly or project fee basis.

About Hooker & Holcombe

Hooker & Holcombe opened its doors in 1956 as a full-service pension and actuarial consulting firm. Over the years, the firm has expanded its services to include comprehensive, integrated consulting and investment advisory services for all types of employer-sponsored retirement plans. In addition, wealth management services are available to individuals seeking customized financial planning services. Hooker & Holcombe's reputation for integrity, combined with its ability to deliver outstanding professional services, has made it one of the premier actuarial, retirement services and investment advisory firms in the Northeast. For more, visit hhconsultants.com.



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