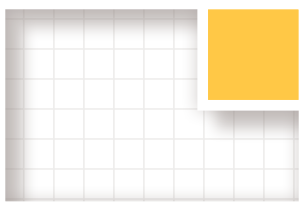


## 2017 Year in review





*“In these changing times, our clients benefit even more from our customized solutions, unmatched expertise and our transparent business practices.”*

When I look back on 2017, I take great pride in all that H&H has accomplished – internally, and for our clients and business partners. As one of the largest privately-held actuarial, retirement services and investment advisory firms in the Northeast, our mission remains clear: create value for each client through customized solutions and superior quality.

During the past year we focused on creating value in three distinct areas:

- **Technology.** As a leading provider of customized retirement plan solutions, we understand that delivering efficient and effective tools to our clients and their employees is imperative to achieving superior outcomes. Our commitment to providing clients with leading-edge technology is evident by our investments in our exclusive PensionEdge® Plus system that brings value to our pension clients, in our retirement services unit where we deliver superior defined contribution recordkeeping and TPA services, and in our investment advisory group that provides clients with open-architecture fund platforms and investment tools built around their unique needs.
- **Unmatched expertise.** Integrity, fairness and an entrepreneurial culture that inspires our employees to thrive have helped us retain and attract some of the best talent in the industry. This team of experienced, passionate professionals bring their ideas and enthusiasm to the table each and every day, empowering us to build a stronger, even more responsive firm with a dedicated focus on our clients.
- **Transparency.** Recent fiduciary rulings are an emerging concept for some of our competitors, but transparent business practices and fiduciary responsibility have been at the forefront of our business philosophy since we opened our doors over 62 years ago. As a fiduciary to our clients, we have a responsibility to be transparent in all of our business dealings. This issue is critical to the health of our industry and the quality of the services we deliver.

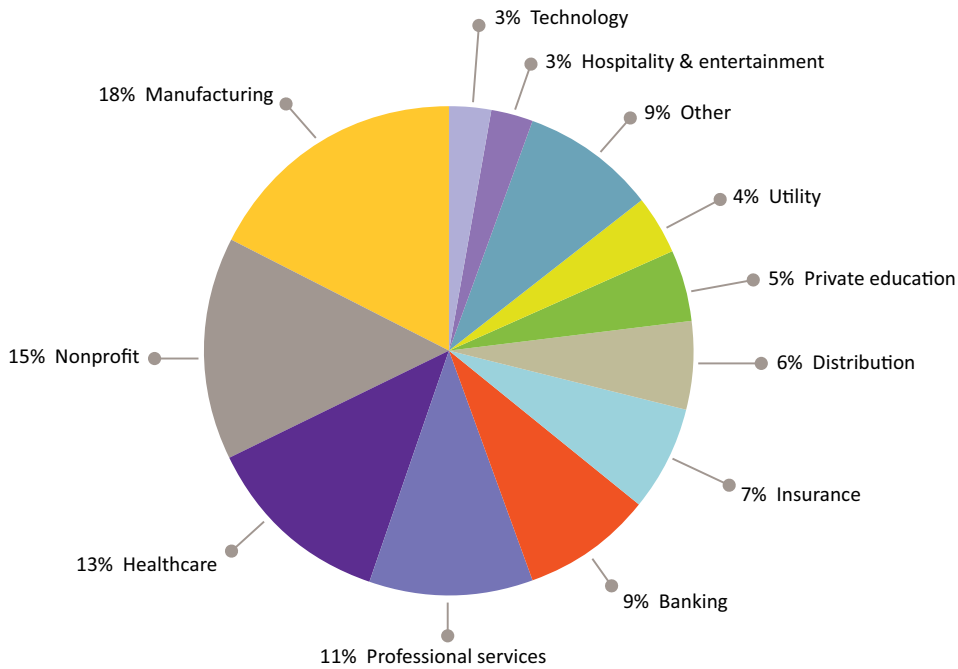
In these changing times, our clients benefit even more from our customized solutions, unmatched expertise, and our transparent business practices. As H&H builds on its vision for 2018, we will continue to question all that we do to ensure our leadership position in the region without losing site of quality, transparency, openness and integrity.

Sincerely,

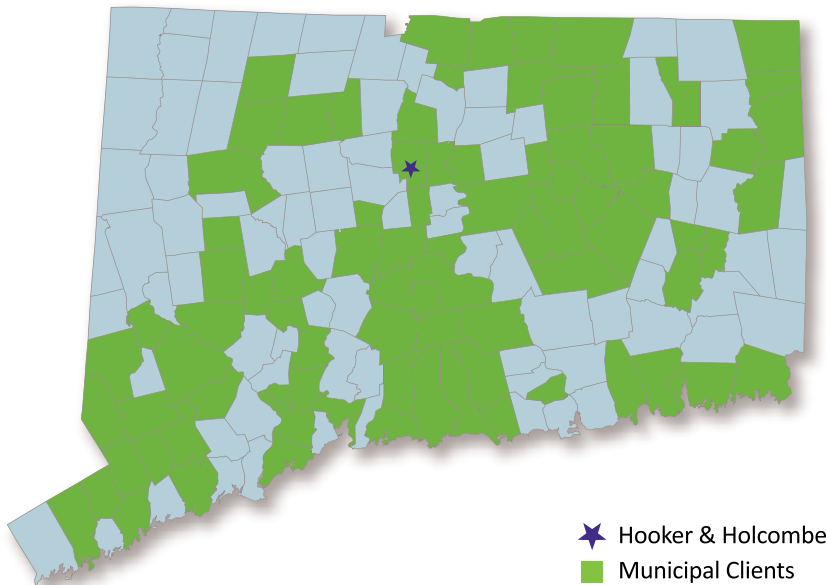
Richard S. Sych  
President  
Hooker & Holcombe

## Corporate clients by industry

Our depth of experience spans nearly every industry



## CT municipal leadership



Of those CT municipalities with pension and/or OPEB plans:

**43%**  
purchase our pension services

**57%**  
purchase our OPEB services

## By the numbers...

### 3 lines of business

offering bundled or unbundled solutions



under one roof

### 62 years in business

**\$2.4 billion**  
Assets under advisement  
for our Investment Advisory group

**855** defined benefit and defined contribution plans

**70** experienced and talented professionals

## Award winning teams deliver for our clients



One of only 27 companies named in the small/medium business category in 2018

Investment Advisory team recognition



Top advisor with AUA over \$100 million

planadviser's 2018  
**TOP100**  
RETIREMENT PLAN ADVISERS

planadviser's 2017  
**TOP100**  
RETIREMENT PLAN ADVISERS

planadviser's 2016  
**TOP100**  
RETIREMENT PLAN ADVISERS



## Work hard. Play hard.

This year, as in the past, employees dedicated hours of their time to helping others. We also managed to fit in a little fun.



# h&h

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The "PLANADVISER Top 100 Retirement Plan Advisers" list is compiled from responses to the PLANADVISER Retirement Plan Adviser Survey. The list is drawn solely from a set of quantitative variables and information in the survey supplied by the advisers themselves. H&H qualified under the small team category, which is an advisor with 10 or fewer team members, in 2016 and 2017. Go to [planadviser.com/Top100](http://planadviser.com/Top100) for more information. No fee is charged to participate.

NAPA.net: Established in 2017, nominees had to be individual advisor team/offices with a defined contribution book of business. To be considered, firms had to submit responses to an application form, including information about their practices, notably their defined contribution (DC) assets under advisement. The list is created and conducted by the National Association of Plan Advisers, an affiliate organization of the American Retirement Association, a non-profit association. No fee is charged to participate.