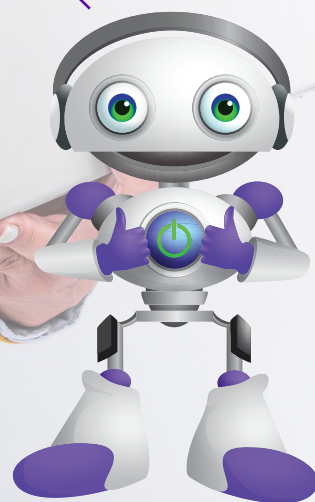




With my help, this plan sponsor has a secure, online pension plan with real-time data, robust reporting and Worktrack to monitor process.



Hooker & Holcombe, founded in 1956, is a leading regional provider of comprehensive actuarial, investment advisory and retirement plan consulting services. Through the expertise of dedicated and knowledgeable professionals, including skilled actuaries and CFA Charterholders, the firm designs and implements customized retirement plan programs based on proven best practices and advanced technology that exceed client expectations. The firm also provides portfolio management services for individuals. Learn more at [hhconsultants.com](http://hhconsultants.com)

## Identify

A long-standing client and global leader in the aerospace and defense manufacturing industry was faced with an increasingly common challenge: a key human resources employee responsible for administering a very complex pension plan was approaching retirement. No one else in the department had the time and experience required to oversee the administration of the plan. After an exhaustive search, recruitment efforts failed to surface an individual with the experience necessary to satisfy the company's needs. They needed a better solution.

## Achieve

As the company's actuary for decades, we understood the complexity and nuances of their pension plan. We also knew the team and process, giving us the information required to quickly craft a strategy to modernize their pension using our online portal, PensionEdge®.

In addition to giving the plan sponsor secure, instant access to 'real time' data, the portal would provide robust reporting and Worktrack, an online assistant for monitoring all pension-related tasks on one screen. Participants would also be able to view their personal pension data, calculate unlimited pension scenarios, and request a final benefit package from the security of the online portal. For additional participant support, H&H Service Center representatives would be available to answer questions and provide assistance when needed.

## Exceed

The client was delighted with this effective and modern strategy. The solution enabled the current key human resources employee to pass along valuable insights before retirement. Together with their dedicated PensionEdge® onboarding team, a fully-customized portal was built. Users now have quick and easy access to pension data and the tools they need from any device and location with an internet connection.

As a result, the plan sponsor is able to administer the plan while focusing on other HR-related responsibilities, and participants are happy with the newfound convenience and modern tools.

This is just one example of the many ways we help plan sponsors and their participants maximize benefits while lowering costs. Leverage our experience for your retirement plan needs. Visit [hhconsultants.com](https://hhconsultants.com) to learn more.



The elements of success